sitrion

Sitrion Social
Version 5.5

Planning and Installation Guide

7/25/2017

Contents

Introduction

Overview

This document will guide you through the installation of the Sitrion Social. You should have administrative rights before installing these products on your information technology machines. Read through the entire section prior to beginning the installation process. Each section has information about preparing for installation and what to have on hand, what to expect, how to handle situations, etc. This introductory section includes key updates in recent releases.

Version 5.5 Notes

In the 5.5 release, all components (core Sitrion Social solutions along with add-on capabilities such as Video Stream, Internal Communications, and Engagement Scorecard) have had their version numbers set to 5.5. This should make it more simple to know the current version and ensure compatibility between the components. The 5.5 release contains the same changes added to version 5.4.37 to facilitate installing on some SharePoint 2016 configurations and is the recommended release for any SP2016 deloyment.

Product and company name changes

With the change of change of company name from NewsGator to Sitrion, the products have also undergone a name change, beginning with the 4.5 releases. "Sitrion Social" is a bundled SKU that refers to what were formerly called Social Sites, News Stream, Video Stream, Spotlight and Enrich. New customers can only purchase this bundled SKU. Existing customers can still purchase the capabilities individually. The Internal Communication and Innovation solutions and the Engagement Scorecard are separate purchases for all customers. Customers who had licensed the Idea Stream module continue to get updates to that portion of the software. For simplicity for existing customers, the historical names are used to referred to the portions of the software which are now part of Sitrion Social (e.g. Spotlight, Video Stream). Similarly, NewsGator company name is used instead of Sitrion in historical text.

Removals, deactivations, re-setup for Social Search BDC Model

As of the 4.5 release, the Social Search BDC Model to integrate with SharePoint search was changed. Consequently, after upgrading from any version prior to 4.5 to 4.5 or later, the search integration will need to be setup again. To make this easier to do, prior to upgrading to 4.5 or later, it is recommended to remove the existing content source in the Search Service Application for the Sitrion Social data and deactivate the NewsGator Social Search BDC Model farm features.

NOTE: As of the 5.4 release, the installer pre-requisite checks have been changed slightly. In particular, we have modified the WMI check to 1) not set the path of the file (in case their servers have difference windows paths between their servers). And we have changed the command to "where.exe iisreset.exe".

Copyright Information

The information in this document, including URL and other Internet Web site references, is subject to change without notice. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Newsgator Technologies Canada inc.

Before You Begin - Social Sites Prerequisites

⚠️	Social Sites is not supported in isolation of an LDAP store such as Active Directory. Social Sites installation will fail in such an environment.

⚠️	Multiple proxy groups and/or multiple User Profile Service Applications within the same farm are not supported configurations for SharePoint environments running Sitrion Social. See the **Configuration Prerequisites** section below for more details.

Software Prerequisites

A. **SharePoint version**: You must have a valid installation of SharePoint Server 2010 with Service Pack 1 (SP1) or Service Pack 2 (SP2), or SharePoint 2013, Standard or Enterprise. SharePoint Foundation 2010/2013 is not supported. SharePoint 2010/2013 in Standalone mode is not supported. The prerequisite check screen of the 2010 installer will inform you if you don't have a valid SharePoint installation (with the exception that it does not check whether your SharePoint installation is isolated from an LDAP store, an unsupported configuration for Social Sites as mentioned below).

B. **Database**: If you choose to not store Social Sites databases on SharePoint's default server for content databases, the server you provide must be a Microsoft SQL Server 2008 server with SP1 or above or a Microsoft SQL Server 2012 server. (Some very limited SharePoint 2010 configurations support the use of Microsoft SQL Server 2005, but NewsGator does not. SharePoint 2013 requires at least the 64-bit edition of SQL Server 2008 R2 Service Pack 1.) SQL Express is not supported. We recommend SQL Server 2008 R2 or SQL Server 2012 running on top of Windows Server 2008 R2 or Windows Server 2012 for the best scalability and performance.

C. **SharePoint Cumulative Updates**: Although there is no prerequisite to use a certain CU, it should be mentioned that each release of Social Sites is tested with only a limited number of SharePoint 2010 bimonthly Cumulative Updates. When installing on SharePoint 2010, we recommend using at least the June 2011 CU refresh (14.0.6106.5002), as all Social Sites versions beginning with 2.0 require SharePoint 2010 to have Service Pack 1 or later. A list of all SharePoint CU's that NewsGator has tested each GA release of Social Sites since v2.0 with can be found in **Appendix H**.

D. **.Net 4.0**: Social Sites versions 4.0 and later require .Net 4.0 to be installed on the server from which you are installing. SharePoint 2013 will already have this; SharePoint 2010 may need this to be installed in addition to the .Net 3.5 version it should already have.

• **NOTE**: As of the 5.2 release, there is an added pre-requisite check in the installer to help avoid issues with WMI infrastructure shortcomings during installs. The new pre-requisite check does two things: 1) attempts to list the Windows services on each server in the farm, and 2) attempts to remotely run a basic Windows command (where.exe). This covers both scenarios which the installer does things remotely.

Software Prerequisites for Enrich Module

The Enrich 5.0 module requires Social Sites 5.0. Optionally Spotlight 5.0 can be used to create badges to recognize users who create a high number of knowledge base articles and video scenarios.

The Enrich module consists of the Knowledge Base and Video Scenarios components. In order to use the Video Scenarios component of the Enrich module, the Video Stream 5.0 module will also be required.

NOTE: If you are upgrading please read the "Instructions regarding Video Stream and Enrich Upgrades" below.

Software Prerequisites for Video Stream Module

The Video Stream 5.0 module requires Social Sites 5.0.

Video Stream requires the use of two installers: the Social Sites 5.0 installer and the Video Stream Additional Components installer.

The Video Stream Additional Components installer is responsible for installing all Video Stream components that reside outside of SharePoint. These components are:

- Video Encoding Service
- Streaming Service

Software prerequisites for each of these components are listed below.

⚠	Social Sites core with the Video Stream module MUST be installed first before installing the Video Stream Additional Components which is described below.
	It is strongly recommended that readers read the Video Stream section of Planning section below before attempting to install Social Sites or the Video Stream Additional Components.

⚠	Support for posting videos in the stream does not require installing the additional components.

Video Encoding Service Software Prerequisites

Install encoders based on deployment and usage scenarios below.

Encoder Installation Scenarios				
Deployment/Usage	**Browser/Smooth Streaming/VC1**	**Browser/Progressive Download/VC1**	**Browser/Progressive Download/H264**	**Mobile/Progressive Download/H264**
Native Video Stream	*Microsoft Expression Encoder 4.0 (Free version)* [default]	*Microsoft Expression Encoder 4.0 (Free version)****	*FFMPEG/QT-FAST-START****	*FFMPEG/QT-FAST-START ****

		Microsoft Expression Encoder 4.0 (Free		
Video Stream with Kontiki Integration	N/A	version) [Default]	FFMPEG/QT-FAST-START***	N/A

*** Please read **Appendix L – Configuring the Video Stream Encoder**

NOTE: Thumbnail generation is done by Microsoft Expression Encoder but can be configured to use FFMPEG. See **Appendix L - Configuring the Video Stream Encoder** to enable this option.

To install Microsoft Expression Encoder you will need to:

- Install .Net Framework version 4.0

- Download and install the Microsoft Expression Encoder from: http://www.microsoft.com/en-us/download/details.aspx?id=27870

- The Desktop Experience role must be activated

- Recommend installing (but optional to support popular audio codecs): Apple QuickTime (iTunes is not required)

- Install additional codecs as required. For example, there are codec libraries that support FLV1 that we have experimented with in the lab like the ones from K-Lite Codec Pak (http://www.codecguide.com/about_kl.htm)   In this case we loaded the FLV1 codec only to minimize clobbering the existing codecs installed and have not tested the possible (but remote) impact on the other installed codecs.   Be sure to install additional codecs with the account that the encoding service is run as.

To install FFMPEG/QT-FAST-START:

1. Download the following encoding tools:
   - 32 Bit
     a. http://ffmpeg.zeranoe.com/builds/win32/static/ffmpeg-20121125-git-4fa706a-win32-static.7z
     b. http://ffmpeg.zeranoe.com/builds/qt-faststart/win32/qt-faststart-git-91a4abd8-win32.7z
   - 64 Bit
     a. http://ffmpeg.zeranoe.com/builds/win64/static/ffmpeg-20121125-git-4fa706a-win64-static.7z
     b. http://ffmpeg.zeranoe.com/builds/qt-faststart/win64/qt-faststart-git-91a4abd8-win64.7z
2. Extract the contents of the FFMPEG file.
3. Copy the ffmpeg.exe from the **bin** folder to the root folder of the Video Stream encoding service
4. Copy the content of the **presets** folder to a new folder named **ffpresets** at the root folder of the Video Stream encoding service folder.
5. Extract the contents of the QT-FastStart file.
6. Copy qt-faststart.exe to the root folder of the Video Stream encoding service.
7. **Note**: Unless changed during the installation of the Video Stream additional components, the encoding service

Streaming Service Software Prerequisites

The following will need to be installed on the server before installation if you are using **Smooth Streaming**:

- IIS version 7+

- IIS Media Services version 4+ (http://www.iis.net/download/SmoothStreaming)

- .NET Framework version 3.5 SP1

- .NET Framework version 4.0 (required only by the Additional Components installer)

- ASP.NET

Configuration Prerequisites

Note	Since the 4.5 release, we also deploy our solutions on to the Central Admin web application. For you APP servers you can achieve this by running the SharePoint Foundation Web Application Service OR have Central Administration deployed on your application servers.

A. **LDAP Store**: Social Sites is not supported in isolation of an LDAP store such as Active Directory.   Social Sites installation will fail in such an environment.

B. **No Multiple Proxy Groups nor Multiple USPA's**: Multiple proxy groups are not supported. Nor are multiple User Profile Service Applications running in the same farm. (SharePoint service applications such as SharePoint's User Profile Application, Search, Business Connectivity Services, and NewsGator's Social Sites run in the context of a *proxy group*. By default, all Service Applications run in the default proxy group. Multiple proxy groups are not a supported configuration for SharePoint environments running Sitrion Social. While not a supported configuration, if you must run multiple proxy groups, Sitrion Social and the User Profile Service Application that it uses must exist in the default proxy group.)

C. **AntiXss Library**: The AntiXssLibrary is required on the server which runs the NewsGator Social Platform Service application. Without this, community activity streams will not display usernames nor avatars, nor will users be able to 'like' or 'follow-up' on events. If the AntiXssLibrary dll is not in the GAC on this server, it can be put there by going to Central Administration -> System Settings -> Manage Farm Solutions and deploying the SharePoint.ajax.wsp solution to the server that hosts the NewsGator Social Platform Services application. From the drop down menu choose CA app. Then recycle the NewsGator backend app pool.

Capacity Planning

Meeting Load Requirements

NewsGator believes customers should size the SharePoint Server which will be running the User Profile Service Application (and the NewsGator managed service) at 25% above the projected sizing based on the profile service by itself. Size web front ends to account for 30% to 100% more load than with SharePoint alone, based on the number of web front ends in your SharePoint environment, according to the chart below. (For a detailed technical explanation of the testing used to derive these guidelines, please request the document **Sitrion Social - Testing Procedure and Results Used to Establish Capacity Guidelines**.)

Number of WFEs	1	2	3+
% sizing increase suggested to run Social Sites	100%	50%	30%

Alternatively, if you don't have extra capacity in your web front ends to handle additional load and will be adding similar-capacity web front ends, you should add about 45% to your number of WFE's from your base sizing to retain the same performance. In NewsGator's tests, the database server is not seeing significant pressure. Note that as you add web front ends without adding application servers, your application server(s) may become your bottleneck, however based on NewsGator testing this will only happen if you have far more WFE's than you do application servers (with two WFE's and one application server, the WFE's are still the bottleneck).

Meeting Storage Requirements

NewsGator suggests planning for Social Sites's databases to require an amount of storage per user for every 180 days of data retained in the database, in accordance with the charts below. So, for example, if set to retain 720 days = 180 days x 4 of social data, and your Social Sites users are very active in Social Sites (add a relatively large amount of content it it) you would want to allot 0.25 MB x 4 = 1.0 MB of storage per user with an active SharePoint profile in your system. If you have a good idea of how many of your users are actively contributing to Social Sites (the NewsGator licensing information page in Central Administration will give you an idea of this), you may prefer to use the numbers in the first row instead, meaning, for our example, you would allot 1.10 MB x 4 = 4.40 MB per active user of Social Sites. NewsGator recommends using both calculation methods for each database, and using the larger result.

Actual storage required in practice may vary for you, depending on how actively your user base uses Social Sites.

NewsGator Social Database		
Calculation method	Less active user base	More active user base
MB per user that actively contributes to Social Sites	0.03	1.10
MB per user with an active SharePoint profile	0.01	0.25

NewsGator Reporting Database		
Calculation method	Less active user base	More active user base
MB per user that actively contributes to Social Sites	0.002	0.100
MB per user with an active SharePoint profile	0.001	0.030

NewsGator News Manager Database

Calculation method	Less active user base	More active user base
MB per user that actively contributes to Social Sites	0.0	2.0
MB per user with an active SharePoint profile	0.0	0.5

Configuration Planning for Video Stream

There are two parts to the Video Stream installation process. The first part is part of the regular Social Sites installation where Video Stream module is selected. The second part of the installation installs the actual encoding and streaming servers and is described below in the Video Stream Additional Components Installation section. This section explains the different components of Video Stream and the various parameters to be configured.

Video Stream consists of 3 major parts:

- Server(s) running SharePoint and Social Sites with the Video Stream module installed

- Video Encoding Service (outside of SharePoint)

- Streaming Service (outside of SharePoint)

Each of these components can be installed all on one server or each component can be deployed on separate servers.

For more sizing guidance for more demanding environments, please consult **Appendix N - Performance Testing and Sizing of Video Stream**.

NOTE: If you are upgrading please read the "Instructions regarding Video Stream and Enrich Upgrades" below.

Video Stream Module Parameters

This section describes those configuration parameters shared by the Social Sites installer and the Video Stream Additional Components installer.

Component	Parameter	Allowed Values	Purpose
Video Stream SharePoint Module	Database Server	Server hostname	Name of the server that will host the Video Stream database.
Video Stream SharePoint Module	Database Name	Database name	Name of the Video Stream database.
Video Encoding Service	Folders for videos waiting to be encoded (aka Video Encoding Service input directory)	A local or UNC (windows file share) style path	Folder where the SharePoint Video Stream job will copy videos waiting to be encoded. The Video Encoding Service retrieves videos waiting to be encoded from this folder.

Video Encoding Service	Folders for videos that were encoded (aka Video Encoding Service output directory)	A local or UNC (windows file share) style path	Folder where the Video Encoding service will encode videos to. The SharePoint Video Stream job copies videos to the Streaming Server from this folder.
Streaming Service	Streaming server folder to store videos (aka Streaming Directory)	A local or UNC (windows file share) style path	Folder where the SharePoint Video Stream job will copy encoded videos. Must be the root directory or a sub directory of the Streaming Service directory. For planning purposes note that this folder will store video smooth stream content for the entire farm.
Streaming Service	Streaming Server Address	A URL	The address of the website created for the streaming service. This address must be either a different hostname or a different port number from SharePoint.
Video Stream SharePoint Module	Upload Folder	A local or UNC (windows file share) style path	Directory used by the Video Stream Large File Uploader to store file fragments during the uploading process.

Steps before Installing Video Stream

The Encoding Service and Streaming Server are two separate components that work together with the Video Stream module installed into Social Sites. They are distributed within an installer that is separate from the Social Sites installer. Neither of these two components requires SharePoint to be installed on the same server.

It is advisable to install the Encoding Service on a server separate from the SharePoint farm. The Encoding Service will have high CPU usage which could interrupt service to any other applications hosted on the same server.

The Streaming Server can be installed onto a dedicated streaming server or a SharePoint server.

Video Encoding Service

The Encoding Service requires an input and output folder. See Video Stream Module Parameters in the previous section for more information. The folder reference to use in the Social Sites Installer will vary depending on where the Encoding Service is installed.

If the SharePoint farm consists of only one server and the Encoding Service is installed on this same server, then a local file path can be used for the Encoding Server's input and output folders.

However, in all other scenarios, the input and output folder must be a UNC style path (a Windows File Share).

The SharePoint farm account needs to have read/write access to the folders (and optional file shares). The account used by the Encoding Service will also need read/write access to the directories and have **dbowner** role on the Video Stream database.

It is best to have the server hosting the Encoding Server to also host the Encoding Service file shares. However, this is not a requirement.

At the moment Video Stream does not support multiple encoding servers.

If you have special encoding requirements, please see **Appendix L: Configuring the Video Stream Encoder**.

⚠	In all scenarios, the folders and the optional file shares will need to be created *before* running the Video Stream Additional Components installer.

Streaming Service

The Streaming Service uses IIS Media Services to smooth stream video content to the SilverLight video player. The video content must be stored on a local folder on the server hosting the Streaming Service. The folder to reference in the Social Sites Installer will vary depending on where the Streaming Service is installed.

If the SharePoint farm consists of only one server and the Streaming Service is installed on this same server, then a local file path can be used for the Streaming Server's Streaming Directory (in the Social Sites installer).

However, in all other scenarios, the Streaming Directory must be a UNC style path (a Windows File Share) in the Social Sites installer.

The SharePoint farm account needs to have read/write access to the folder (and optional file share).

⚠	In all scenarios, the folder and the optional file share will need to be created *before* running the Video Stream Additional Components installer.

Scaling Video Stream

Single Server

Video Stream can be deployed beside SharePoint with all components installed on the same server. This is a viable option for small deployments, test servers or deployments with a low number of videos uploaded per day.

Separate From SharePoint

When encoding videos the Encoding Service component can slow down a SharePoint deployment on the same machine.

It is recommended that the Encoding Service component be installed on a dedicated server. The more processing power added to this server will decrease the amount of time a video takes to get encoded and will allow more than one video to be encoded at one time.

When the encoding service is on a separate server, the encoding service machine will make 2 Windows Shares available to receive videos waiting for encoding and to provide encoded videos once they have been encoded.

The server should have theses minimum specs:

- Microsoft® Windows Server 2008 or 2008 R2 operating system
- 1 GHz or faster processor
- 1 GB of RAM or more
- 2 GB or more of available hard-disk space
- .NET Framework 4.0

In this configuration the Streaming Server component will be installed alongside SharePoint. The Streaming Server will have minimal impact on the SharePoint install as the Streaming Server is only serving up static files.

All Components on Separate Servers

Video Stream can be scaled by moving each of Video Stream's components onto dedicated servers.

This will ensure that encoding of videos and watching videos has no impact on SharePoint performance.

The streaming server should have these minimum specs:

- Microsoft® Windows Server 2008 or 2008 R2 operating system
- 1 GHz or faster processor
- 1 GB of RAM or more
- 2 GB or more of available hard-disk space
- .NET Framework 3.5 SP1

When the Streaming Server is deployed on a separate server from SharePoint, the Streaming Server machine will make a Windows Shares available to receive smooth stream content.

Account/Permissions Prerequisites

A. The account running the NewsGator Social Platform service application needs to be a farm administrator. Otherwise there will be numerous farm properties and persisted objects that it will not be able to update. See the section **Managed Service Application App Pool** under **Installing or Repairing Social Sites** for more details.

B. When installing, upgrading, repairing, or uninstalling Social Sites you must use an account that meets the following prerequisites, all of which are verified for you on the prerequisite check screen of the installer:

- The account must be an administrator of the server on which hosts SharePoint 2010's Central Administration site.

- The account must be a farm administrator in SharePoint.

- The account must be an administrator of the User Profile Service Application, with full control.

- The account must have sharing permissions to the User Profile Service Application, with full control (this is a distinct setting the one just above).

The settings for the latter two of these can be found by going to the Application Management area in SharePoint Central Administration and clicking the Manage Service Applications link, then selecting the User Profile Service Application. See **Appendix B: Setting up your account with the SharePoint permissions that are needed to install Social Sites** for more detailed help setting these permissions and the farm administrator permission.

Things to gather and choices to make before installing

Before you begin installing Social Sites:

A. You must have a license key provided to you by NewsGator support. It will be most convenient to store this license key on the SharePoint Central Administration server before you begin.

B. You must acquire installation files from NewsGator. The WSPs for each module you will be installing will have to be added to the Solutions folder before you can install. See **Validating Setup Folder** below for full details on what WSPs you'll need.

> ***WARNING***: When upgrading a Social Sites installation that already includes some modules, those modules *must* be upgraded at the same time as the Social Sites core. You will be unable to upgrade the modules later, and the upgraded Social Sites core will be incompatible with the older, non-upgraded modules.

C. You will need to know which servers in your farm are serving as web front ends. This is so that you can stop the NewsGator "Services on Server" on each of them once installation is complete, via Central Administration. This is necessary to have them behaving as true web front ends. (These services are called "NewsGator Social Application Services" and "NewsGator Social Platform Services v2".)

D. If upgrading from a previous version of Social Sites, NewsGator recommends *at a minimum* that you back up the NewsGator databases first (a better option is to back up SharePoint as described in the section **Backing Up SharePoint**, below). To prevent interaction occurring with these databases while they are backed up, deactivate NewsGator jobs and stop NewsGator services first. Detailed steps for doing this are as follows:

Step 1: Deactivate all NG jobs farm features:

   1. From Central Administration, click "Manage farm features" (in the System Settings section)
   2. Deactivate the "NewsGator Jobs Feature". This shuts off the core NewsGator jobs.
   3. If they exist, deactivate the "NewsGator Knowledge Explorer Jobs" feature and the "NewsGator News Stream Jobs" feature. (**DON'T deactivate the "NewsGator Social Service Installer" or "NewsGator News Stream Installer" features**.)
   4. From Central Administration, click "Check job status" (in the Monitoring section)
   5. In the left nav, click "Job Definitions".
   6. Open up any remaining NewsGator jobs listed here, and disable each.

Step 2: Stop NewsGator services:

   1. From Central Administration, click "Manage services on server" (in the System Settings section)
   2. **Stop all NewsGator services**.

Step 3: Backup NG databases

E. If your NetBIOS name is different from the fully-qualified domain name (FQDN), your SharePoint 2010 installation will have some problems, and Social Sites will have difficulty installing, unless you enable the User Profile Service Application to support NetBIOS name resolution. See SharePoint 2010 Communities FAQ for more details.

At this time it is unknown whether this same problem occurs with SharePoint 2013.

The following PowerShell script will enable NetBIOS name resolution on the Service Application:

```
$USPA = Get-SPServiceApplication –Id <GUID of User Profile Service Application>
$USPA.NetBIOSDomainNamesEnabled=1
$USPA.Update()
```

F. If you are installing the optional Video Module, there are some preliminary steps you'll need to take before running the installer, including choosing a video server, choosing the location of the Video Stream module

database, and choosing locations for the Video Stream services to use for storing videos in different stages of the encoding process.

Specific items of information you'll need to proceed with running the Social Sites installer are:

- Video Stream database server
- Video Stream database name
- Folder to store videos waiting to be encoded
- Folder to store videos upon completion of encoding
- Folder from which to stream completed videos
- Folder to store uploaded files
- URL for the streaming server

See the **Module Options screen** instructions below for more detail on making these entries.

G. If you are installing in a multi-farm environment, you must choose one farm to be the parent farm on which all services will run. The remaining farms will be child farms. Advice on how to choose a farm to be the parent, and instructions on how to set up these roles, are contained below in the **Installing to a multi-farm environment** section. There you will also find steps to take during and after installation of Social Sites to a multi-farm environment.

Notes on installing to Sharepoint 2013

Upgrading from SharePoint 2010

If you are planning to upgrade from SharePoint 2010 with Social Sites to SharePoint 2013 with Social Sites, please inform your technical contact at NewsGator. NewsGator has a tested set of steps for completing this process successfully, but given the wide variety of possible configurations on which this process could be done, we would like to work closely with the first organizations to go through this process to assure it goes well. The instructions in this document are for "fresh" installs to SharePoint 2013, not for upgrades.

Please note that Appendix B contains instructions for granting rights in Sharepoint 2010. These include:

- How to grant an account SharePoint 2010 Farm Administrator rights
- How to make an account an administrator of the User Profile Service Application
- How to grant an account full sharing access to the User Profile Service Application

Upgrading Enrich or Video Stream from SharePoint 2010 to 2013

Before upgrading Enrich or Video Stream to 2013, make sure:

a) That Sitrion Social including Enrich or Video Stream has been upgraded to 4.5.
b) That Sitrion Social has been upgraded to SharePoint 2013 (by upgrading the site collections).

To upgrade Enrich or Video Stream to 2013, activate the Video Stream and Enrich 2010 to 2013 site collection feature:

Go to *Settings -> Site Collection Administration -> Site collection features*

a. Activate the "NewsGator Video Stream, Video Scenarios and Knowledge Base upgrade from 2010 to 2013" feature.

SSL Alternate Access Mapping required for 2013

In order for Social Sites to interact with SharePoint 2013 Social Features, an SSL (HTTPS) alternate access mapping must exist for each content web application (the web applications where you will have NewsGator integration, including where the main "Social" newsfeed runs). Users are not required to use this alternate access mapping, it is only required for Social Sites to communicate with SharePoint 2013 on the server side. (However, when NewsGator releases the Office 365 SkyDrive Pro integration, end-users will need to be able to access at least one of the web applications via SSL (HTTPS) in order to connect to Office 365.)

Without an SSL (HTTPS) alternate access mapping, certain social features will be unavailable to the end-users on SharePoint 2013. In addition, there will be Event Log and ULS error entries.

Setting it up

This can be set up either prior to or after installation.

If SSL (HTTPS) is not going to be used by the end-users, a domain SSL certificate will suffice (rather than buying one from a vendor). TechNet has documentation on creating a domain certificate: http://technet.microsoft.com/en-us/library/cc731014(v=WS.10).aspx

After the domain certificate is created, an HTTPS binding needs to be added in IIS to each content web application using this certificate. TechNet has some documentation on that as well: http://technet.microsoft.com/en-us/library/cc731692(v=WS.10).aspx

To do this, you may need to manually add an SSL certificate to the IIS servers using the Bindings configurations:

I.
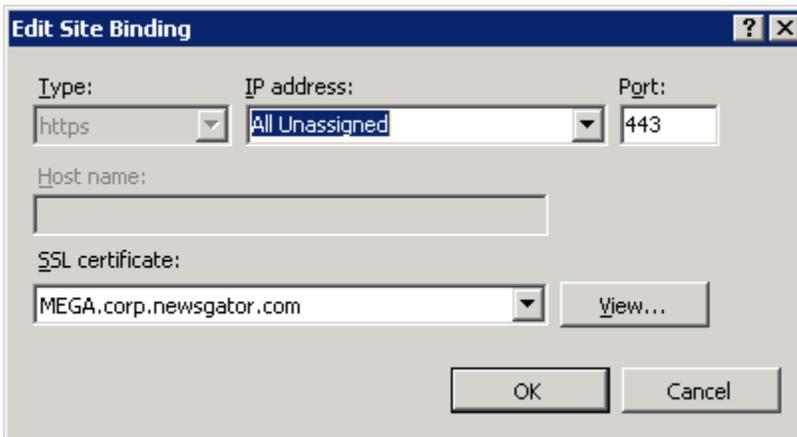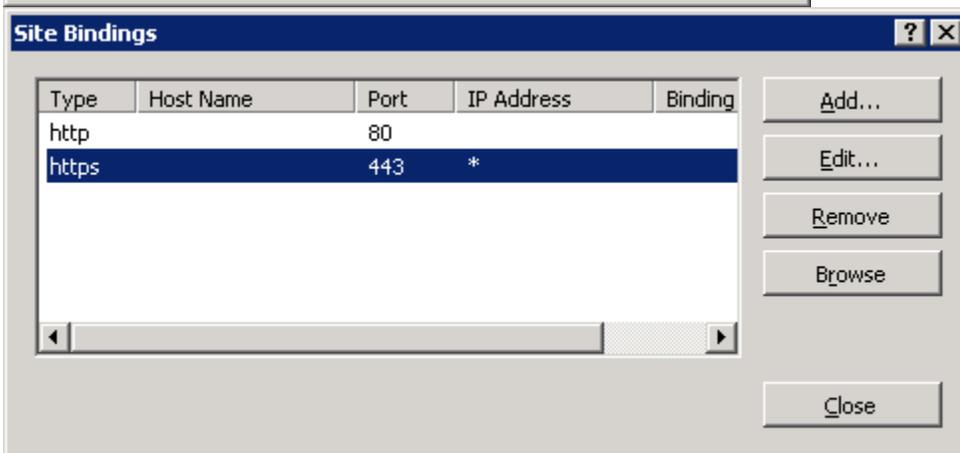
Once SSL is enabled, go to Central Administration > System Settings > Alternate Access Mappings and ensure there is an AAM mapping for the SSL entry. Internally, Social Sites code that uses the SharePoint Object Model requires this SSL in order to read from SharePoint's social data stores.

For example, the following screenshot demonstrates the AAM mapping for the site "http://mega":

Alternate Access Mappings

Edit Public URLs | Add Internal URLs | Map to External Resource   Alternate Access Mapping Collection: SharePoint – 80 ▾

Internal URL	Zone	Public URL for Zone
http://mega	Default	http://mega
http://mega.corp.newsgator.com	Intranet	http://mega.corp.newsgator.com
https://mega.corp.newsgator.com	Internet	https://mega.corp.newsgator.com

Installing to a multi-farm Sharepoint environment

Beginning with Social Sites v2.0, multi-farm SharePoint environments are supported. When installing to a multi-farm environment, the installer needs to be run once on each farm. However, you will need to choose one farm as the "parent" farm on which NewsGator services will run. The preferable choice for the parent farm is the farm running the main User Profile Service Application.

Grant service accounts rights on the NewsGator Social Platform service

All service accounts on the consuming farms (web app pool and timer job accounts) need to have the "Delegation and Impersonation" rights granted on the NG service app in the Enterprise Service Farm:
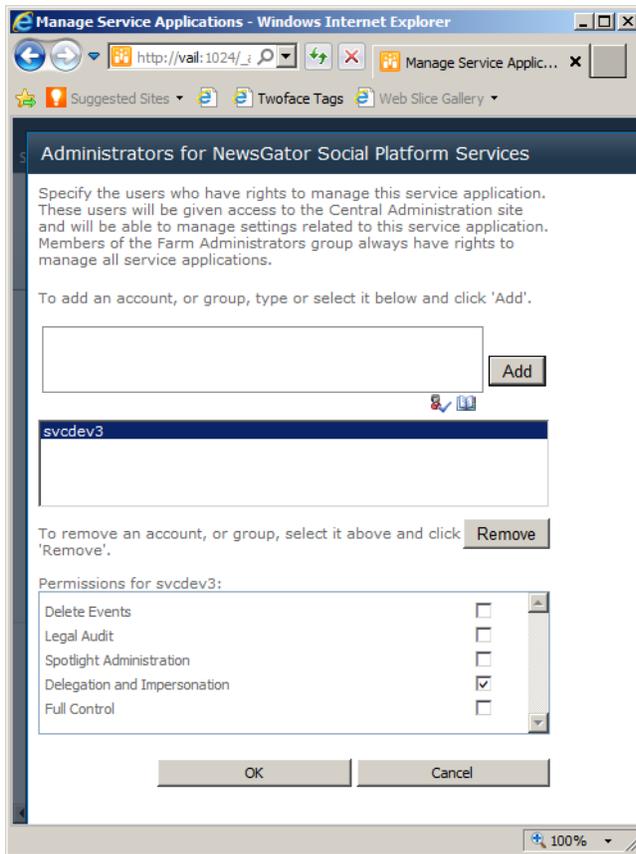
Most services should not be provisioned to child farms

The instructions in this section will be repeated in the **Service Applications** screen instructions, and in the post-install instructions, both below.

In versions 4.5 and later, run the installer, select advance options, select advance options again and use the "Install or Upgrade on a Consuming Farm" switch when installing on a child farm. There are a couple of important requirements for child farms to successfully connect.

1. The child farm needs connect permissions to the service application of the parent farm.

   a) On the child farm, get the farm id. You can use the following powershell:
      (Get-SPFarm).Id

   b) On the parent farm, go to Central Administration->Application Management->Manage Service Applications

   c) Select the service application you are trying to connect to

   d) Click on Permissions in the ribbon

   e) Add the farm id from step 1

f) Give it Full Control

1. The service application's farm feature needs to be activated on the child farm.

   a) On the child farm, go to Central Administration->System Settings->Manage Farm Features

   b) Activate the appropriate Installer farm feature

Connect to services on Enterprise Service Farm

After installation is complete, child farms must be connected to the NewsGator Social Platform Service on the parent farm. For installations with the News Stream module and/or the Enrich module, they must additionally connect to the parent farm's NewsGator News Stream Service and/or Enrich Service. This is a two-step process that consists of

1. publishing the services from the parent farm
2. connecting to the services from each child farm

Please consult **Appendix G: Connecting Child Farms to NewsGator Services on the Parent Farm** for detailed instructions on performing these steps.

Additionally, SharePoint's **User Profile Service Application** on the Enterprise Service Farm must be published from the Manage Service Applications page in Central Administration, as pictured here. Because this is a SharePoint service application, this step may be done either before or after installation of Social Sites.
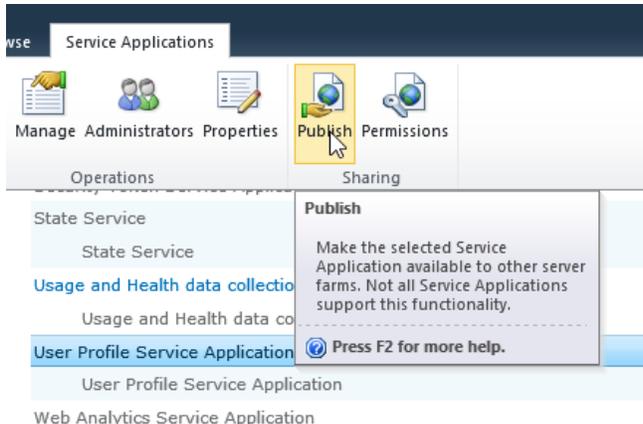
Stop NewsGator Social Application Services on child farms

Also after installing, you'll want to stop "NewsGator Social Application Services" in the list of services on server, for all servers in all child farms, because the platform service won't be running on the child farms.

When to Upgrade, Repair, or Uninstall

⚠️ You should never uninstall Social Sites and reinstall when your intention is to upgrade Social Sites. Doing so will cause damage to your existing communities that can prove very difficult to repair. Use the upgrade option instead.

When you have a full, functioning installation of Social Sites that you would like to upgrade to a newer version, use the Upgrade and Install option *without* first performing an uninstall. Not all setup options that are available when performing a new install of Social Sites will be available during upgrade. If you need to change options that are not presented during upgrade, see Appendix A: Social Sites install settings you can change via SharePoint Central Administration, for a list of Setup settings that can be changed without running Setup again.

Steps Before Installing, Upgrading, or Repairing Social Sites

> ⚠️ *Please ensure that Anti-Virus software is disabled during the installation of Social Sites.*

> *REMINDER*: When upgrading a Social Sites installation that already includes some modules, those modules *must* be upgraded at the same time as the Social Sites core. You will be unable to upgrade the modules later, and the upgraded Social Sites core will be incompatible with the older, non-upgraded modules.

When installing, upgrading, or repairing Social Sites, the first steps are all the same, and are as follows:

Backing Up SharePoint

All production deployments of Microsoft SharePoint should include a backup or other disaster recovery mechanism. When making changes to the SharePoint farm, such as installing new updates or software, it is imperative to have a mechanism that will allow the farm to be reverted to a working state if something goes wrong. This includes installing, updating, and uninstalling Windows Updates, service packs, cumulative updates, and Social Sites.

Before you install, update, or uninstall Social Sites on your production SharePoint farm, we strongly urge you to backup your farm so that it can be reverted in the case something does go wrong.

Microsoft has provided detailed documentation about various SharePoint backup methods on TechNet.

- Backup Solutions in SharePoint 2013: http://technet.microsoft.com/en-us/library/ee428315.aspx

- Backup SharePoint Server 2010: http://technet.microsoft.com/en-us/library/ee428315(v=office.14).aspx

Validating Setup Folder

When you purchase Social Sites, NewsGator will provide you with a Setup folder containing your installation files. It should have a file called Setup.exe in it. It should also contain a folder within it called "Solutions". This folder must contain a WSP file, or set of WSP files, corresponding to every optional module you purchased for install, in addition to the WSP's for the core product. If these files do not already appear in the Solutions folder and are delivered to you separately, you will need to put copies of them in the Solutions folder before launching Setup. You'll most likely have the WSPs for each separate module in their own ZIP file. The installer requires all these WSPs to have the same major version, so make sure you get versions of the module ZIP files that match the version of the core product that you are installing.

The core WSP's are as follows:

Sitrion Social 2010 core WSP's

- NewsGator.Communities.wsp
- NewsGator.Core.Application.wsp
- NewsGator.Core.wsp
- NewsGator.PVModule.wsp
- NewsGator.SiteDefinitions.wsp
- SharePoint.Ajax.Library.wsp

Sitrion Social 2013 core WSP's

All Sitrion Social 2010 core WSP's in the list above, plus:
- NewsGator.Application15.wsp
- NewsGator.Core.Fifteen.wsp
- NewsGator.SiteDefinitions.15.wsp

The following table shows which additional WSP files you need if you also have an optional module or solution:

| If you purchased the module or solution called ...	... ensure this (these) file(s) are in the "Solutions" folder before install:
News Stream module	NewsGator.NewsManager.wsp NewsGator.NewsManager.Application.wsp
Idea Stream module	NewsGator.Social.IdeaModule.Sites.wsp NewsGator.Social.IdeaModule.wsp NewsGator.IdeaModule.Fifteen.wsp
Spotlight module	NewsGator.Social.Spotlight.wsp NewsGator.Social.Spotlight.Application.wsp
Video Stream module	NewsGator.CA.CommonAssemblies.App.wsp NewsGator.CA.CommonAssemblies.UI.wsp NewsGator.ScreenCast.ClickOnceDeployment.wsp (optional) NewsGator.VideoStream.App.wsp NewsGator.VideoStream.UI.wsp NewsGator.CA.CommonAssemblies.App.SP2013.wsp NewsGator.VideoStream.UI.SP2013.wsp NewsGator.VideoStream.App.SP2013.wsp
Video Stream module with Kontiki support	NewsGator.VideoStream.KontikiIntegration.wsp (additionally, the Video Stream module WSPs must be included)
Enrich module (without video scenarios)	NewsGator.CA.CommonAssemblies.App.wsp NewsGator.CA.CommonAssemblies.UI.wsp NewsGator.LearningPoint.App.wsp NewsGator.LearningPoint.UI.wsp NewsGator.LearningPoint.App.SP2013.wsp NewsGator.LearningPoint.UI.SP2013.wsp
Enrich module (with video scenarios)	NewsGator.Learning.VideoScenarios.App.wsp NewsGator.Learning.VideoScenarios.UI.wsp NewsGator.Learning.VideoScenarios.App.SP2013.wsp NewsGator.Learning.VideoScenarios.UI.SP2013.wsp (additionally, the Video Stream module WSPs and Enrich module WSPs must be included)

Innovation Solution	NewsGator.CA.CommonAssemblies.App.wsp NewsGator.CA.CommonAssemblies.UI.wsp NewsGator.CA.CommonAssemblies.App.2013.wsp NewsGator.CA.CommonAssemblies.2013.wsp Newsgator.Innovation.App.wsp Newsgator.Innovation.SiteDefinitions.wsp Newsgator.Innovation.UI.wsp (additionally, the Idea Stream module WSPs must be included)
iComm solution	Newsgator.corpcomm.application.wsp Newsgator.corpcomm.sitedefinitions.wsp Newsgator.corpcomm.wsp

Be sure to check permissions on the install files, as downloaded or unzipped files sometimes have restricted permissions which cause a failed install.

> ⚠️ *If you are installing/upgrading both the Enrich and Video Stream Modules please ensure that the WSPs are from the same version.*

Opening the Launcher

Log in to your Applications server (usually the same as your Central Administration server, but not necessarily the same) using an account that meets the pre-requisites listed in part B of the section **Account/Permissions Prerequisites** above, and launch **Launcher.exe** from the Sitrion Social Setup folder provided to you by NewsGator Support. If User Account Control is active on this server, you'll need to launch this by right-clicking on Launcher.exe and choosing "Run As Administrator" from the drop-down menu. This will display the **Sitrion Social Launcher**.
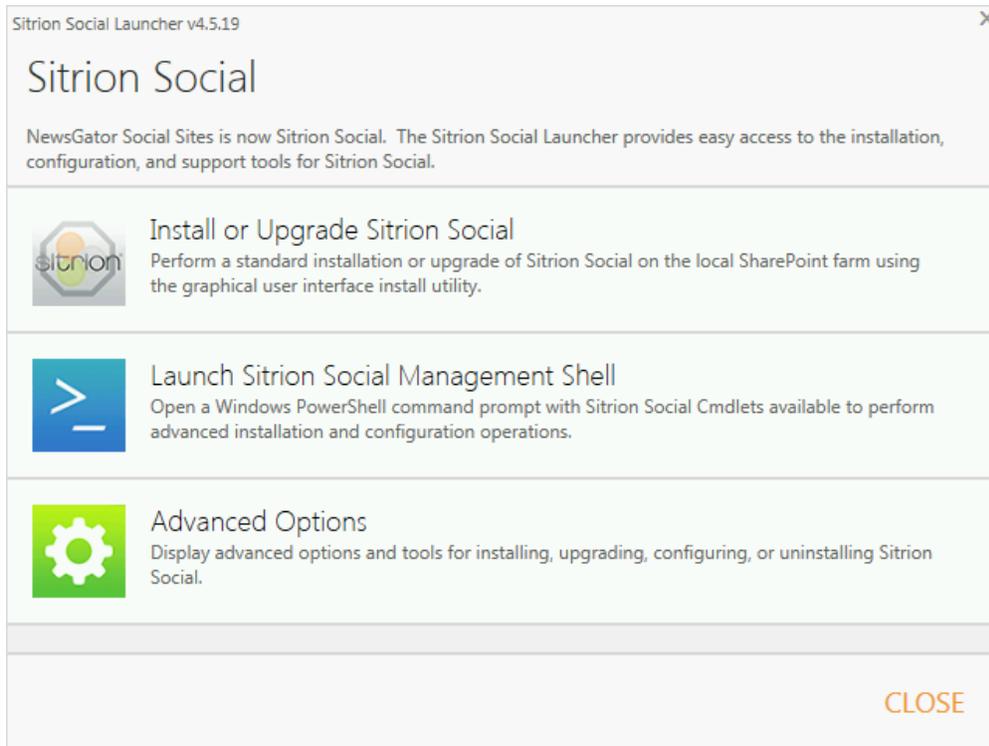
Checking Prerequisites in Advance of Installation, Repair, or Upgrade

Atop the **Install** section of the launcher, the **Check Prerequisites** option allows you to find out if there are any prerequisites that still need to be met, without having to launch the install first, nor agree to the License Agreement first.
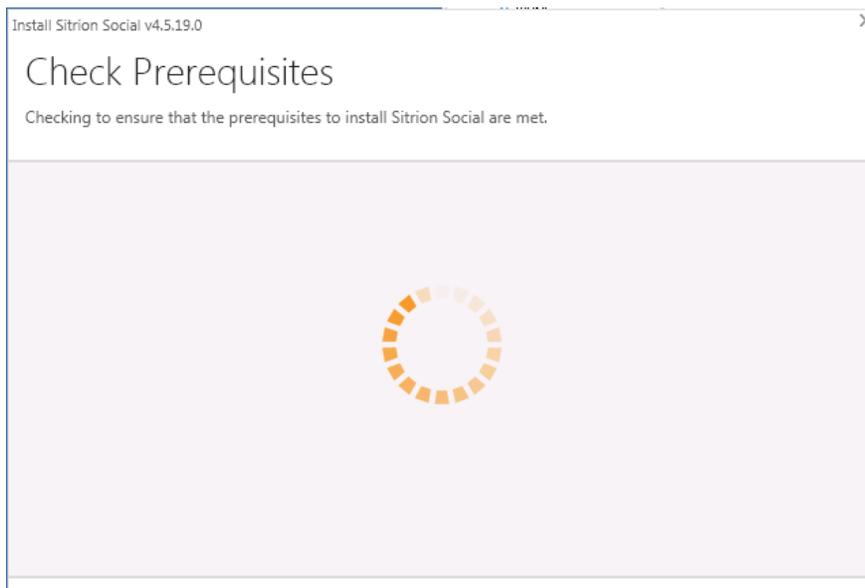
Upon clicking **Check Prerequisites**, you'll see a "working" screen like the one above while various prerequisites are checked. When complete, a summary of the results is displayed, as below.

Install Sitrion Social v4.5.19.0

Check Prerequisites

Checking to ensure that the prerequisites to install Sitrion Social are met.

●	Required	Current user is a SharePoint farm administrator
●	Required	Current user is local machine administrator
●	Required	Installation of SharePoint is at least SharePoint 2010 Service Pack 1 or SharePoint 2013
●	Optional	Microsoft SharePoint Foundation Web Application Service is started on the local SharePoint server
●	Optional	SharePoint My Site host is configured and available
●	Required	User Profile Service Application is configured and available
●	Required	Current user can access the User Profile Service Application
●	Required	Current user is a User Profile Service Application administrator
●	Required	Newer version of Sitrion Social is not installed on the local SharePoint farm
●	Required	Sitrion Social older than version 2.6 is not installed on the local SharePoint farm

CANCEL   NEXT

If you fail any of the "Current User is Farm Administrator", "Current User has access to User Profile Service Application", or "Current User is User Profile Service Application Administrator" prerequisites, follow the directions in **Appendix B: Setting up your account with the SharePoint permissions that are needed to install Sitrion Social** to grant the proper rights to your account, or login with a different account that has the rights described in part B of the **Account/permissions prerequisites** section above.

If you fail the "Installation of SharePoint is at least SharePoint 2010 Service Pack 1 or SharePoint 2013" prerequisite, you probably have SharePoint 2010 without Service Pack 1. Install

If you fail the "User Profile Service Application is Configured and Available" prerequisite, refer to the Technet article "Create, edit, or delete a User Profile service application (SharePoint Server 2010)" for SharePoint 2010 installations, or to "Create, edit, or delete User Profile service applications in SharePoint Server 2013" for SharePoint 2013 installations.

If you'd like to see more detail regarding what was done during the prerequisite check, you can refer to the log file that is automatically generated in the install folder, title like "NewsGatorLog_2013_03_17_18_35_38", where the trailing string of numbers indicates the year, month, day, and time when the prerequisite check was started.

Pre-4.5 to 4.5-and-later upgrades only: removals and deactivations for Social Search BDC Model

As of the 4.5 release, the Social Search BDC Model to integrate with SharePoint search has been changed. Consequently, after upgrading from any version prior to 4.5 to 4.5 or later, the search integration will need to be setup again. To make this easier to do, prior to upgrading to 4.5 or later, it is recommended to remove the existing content source in the Search Service Application for the Sitrion Social data and deactivate the NewsGator Social Search BDC Model farm features.

Upgrades only: optional reboot to unlock files

If you have solutions that are failing to deploy during upgrades, rebooting the server to which solutions are deployed will unlock any solution files that are locked and thus preventing deployment.

Turn off Antivirus Software

You should turn off antivirus software on the server on which you are running Setup, and leave it off for the duration of install. Turn it back on when install is complete.

Installation, Upgrade, and Repair

Installing by script

You can perform a scripted install of Sitrion Social by following the instructions in **Appendix J: Using Powershell to perform a scripted install of Sitrion Social on SharePoint 2010 SP1 or SharePoint 2013**.

Installing by GUI

To install Sitrion Social for the first time, or to upgrade an existing Sitrion Social installation from an earlier version to a newer version, or to repair an existing Sitrion Social installation using the setup files for the version you already have, click the second option, **Install or Upgrade Sitrion Social** in the **Sitrion Social Launcher**.
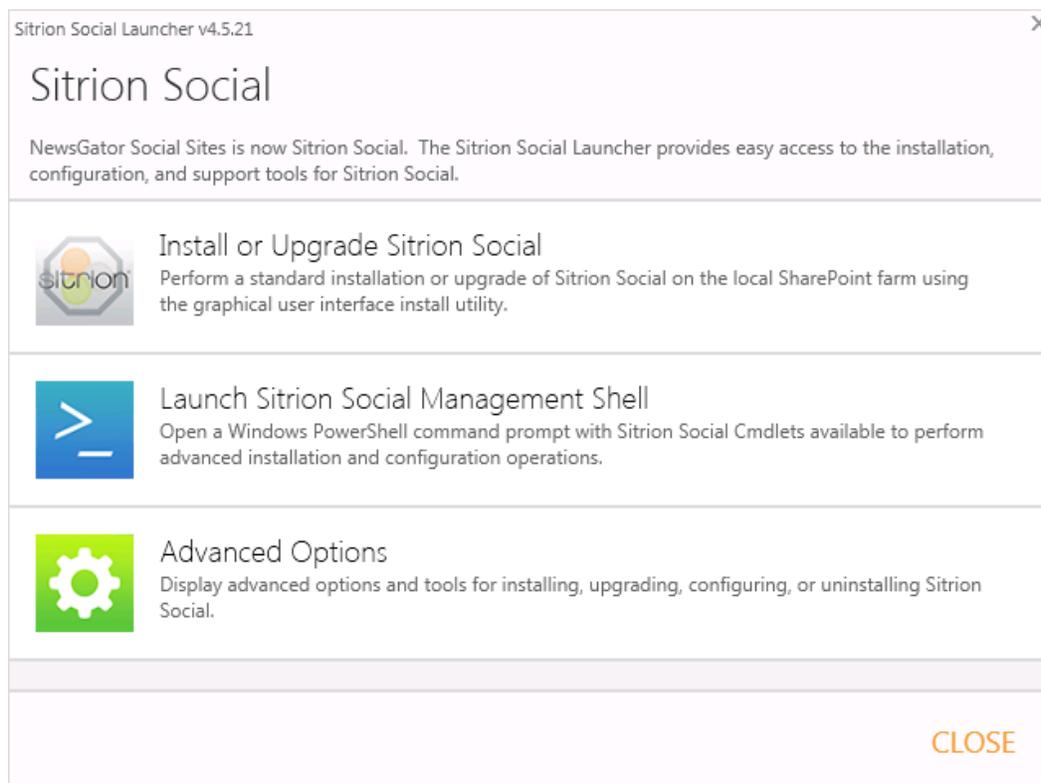
License Agreement

The first screen presents the Sitrion Social license agreement. After reading the agreement, if you agree to the terms, click Accept to declare your agreement to the terms and to proceed with install, upgrade, or repair. Setup will not allow you to proceed to the next screen if you have not agreed to the terms of the license agreement.
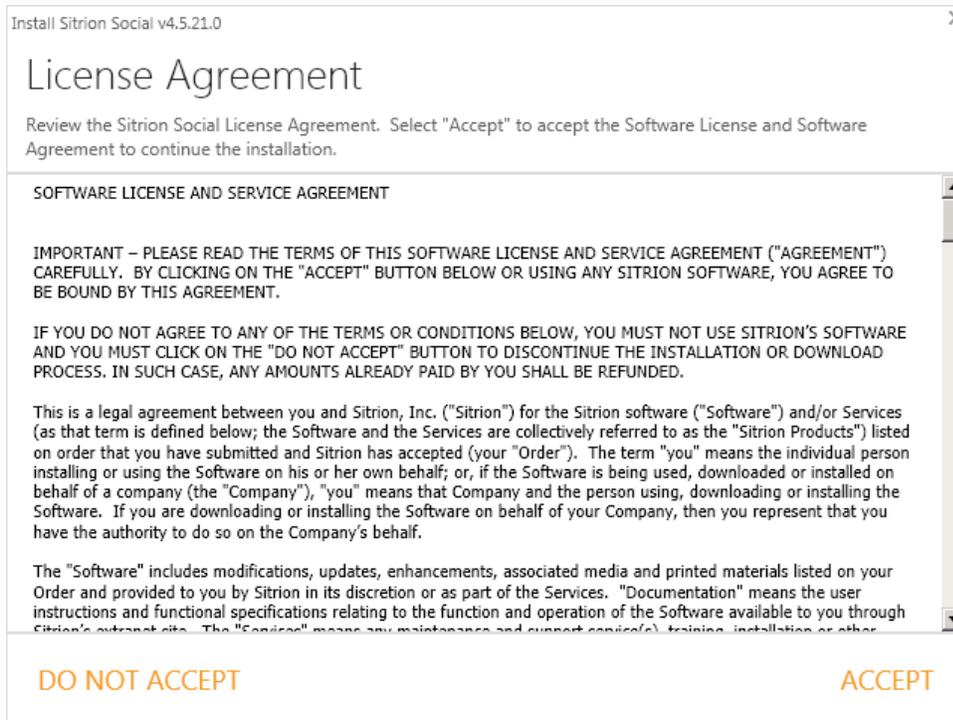
Prerequisites Check Screen

Next comes the Prerequisites Check screen. This does the same checks as described above in **Checking Prerequisites in Advance of Installation, Repair, or Upgrade**. See that section for help on addressing any prerequisites that this screen reports as not met.
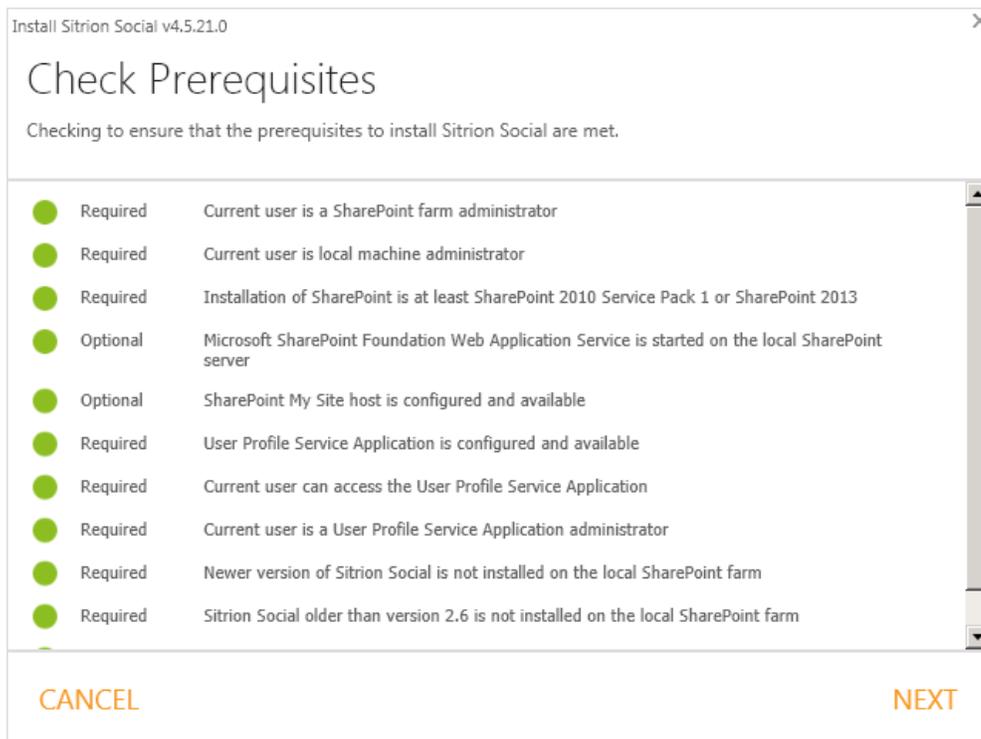
Click Next to proceed to the Installed Components screen.

Modules Selection Screen
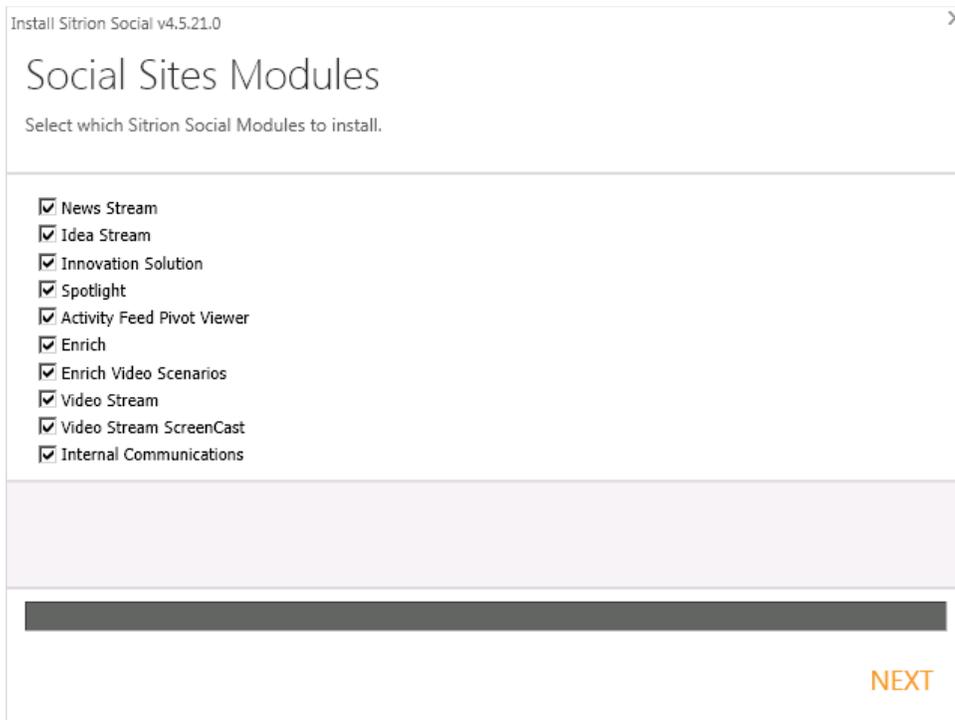
The modules selection screen lists all optional modules that are represented in your Solutions folder. Activity Stream Pivot Viewer is part of the core Sitrion Social offering and so will always appear here. Although part of the core offering, they are not required for Sitrion Social to function and may be left out by unchecking their boxes here.

Other optional modules that may appear here include those pictured above, as well as the Video and Enrich modules. Normally you would not uncheck any of these non-core modules here, as all non-core modules come at an extra charge (depending on how and when the product was purchased).

When upgrading or repairing, modules that are already part of the existing installation will appear greyed out, and cannot be unchecked. Only modules that your are adding new will be uncheckable.
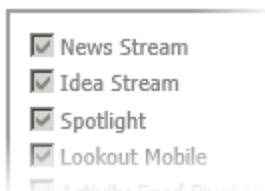
To help you decide whether you wish to include a certain option, select it and the Details pane on the right will provide a description of it.

If you purchased any optional modules, they will be presented at the bottom of the options list. Any optional modules you leave unchecked here will not be installed.

Web Applications Selection
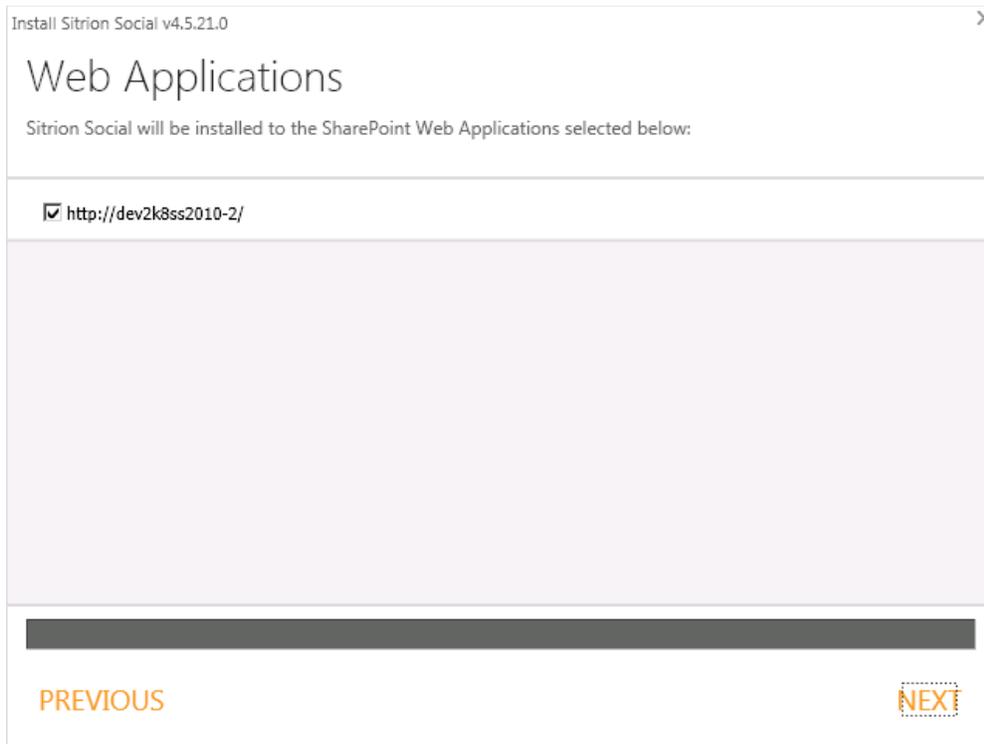
The Web Applications screen appears only for new installations of Sitrion Social, and not for upgrades or repairs. It lists all the web applications in your farm except for the Central Administration web application. Specify only those web applications to which you want Sitrion Social deployed by checking the corresponding boxes.

Sitrion Social Options Selection

This screen only appears for new installations of Sitrion Social, and not for upgrades or repairs.

Copy and paste the license key provided to you by NewsGator Support.

The **SharePoint My Site Host Url** is required if any of the checkboxes at the bottom are selected. The installer will attempt to detect this Url for you and prepopulate this field.

The **Email Handler Lists Web Url** must be specified for alert email replying to work. This is the feature that allows you to add a comment to a conversation or event you have been involved in by simply replying to the email that alerts you to someone commenting on or liking it. This function uses a SharePoint list which may be located anywhere you desire within SharePoint. Simply add the URL of the site you choose in the Email Handler Lists Web Url text box. If you have a site specified in the My Site Location text box above this, a common practice will be to simply use that same site. Visitors' experience when viewing the site will be unaffected by adding this list to it.

The "**Replace SharePoint My Site Newsfeed Web Parts with NewsGator Activity Stream**" option deploys UI elements that provide the full benefits of Sitrion Social. NewsGator recommends this be chosen as part of any Sitrion Social installation. This option will remove the SharePoint My Newsfeed web part and replace it with the NewsGator Activity Stream web part, and add additional NewsGator web parts.

The "**Enable Lookout**" option adds the Sitrion Social Lookout page to SharePoint, at http://{MYSITE}/Lookout.aspx, where {MYSITE} is your My Site server URL. Select "**Set Lookout as My Site Home Page**" if you'd like the "My Site" link in users' top navigation bars to redirect users to the Lookout page. The regular newsfeed page will still be available at the My Newsfeed link.

Database Names and Hosts

This screen appears for all new installations of Sitrion Social, but only appears for upgrades or repairs if new modules are being added that require extra information.

This screen can have many options depending on which modules are part of the installation, but always begins by having you specify which SQL Servers will host the main Sitrion Social database, and the Sitrion Social Reporting database. (The Sitrion Social Reporting database replicates some of the data in the NewsGator Social database each day in an overnight job. This data is useful for creating custom reports using your own reporting tools, and by doing so against the reporting database instead of against the social database, your reporting tools will not adversely impact users' social computing experience. This database is also used by the Spotlight module, for the Top News filter, and for the admin reports web parts.)

If you use failover databases in your SharePoint installation as part of a high-availability strategy, you can specify servers that host the failover databases for these as well (see http://technet.microsoft.com/en-us/library/cc748824(v=office.14).aspx for more about failover databases).

Install Sitrion Social v4.5.21.0

Databases

Specify the database servers and names to install Sitrion Social.

☑ Use Same Database Server(s) for Modules

Social Sites Database Names

Social Database Name

NewsGator_SocialServices

Social Reporting Database Name

NewsGator_Reporting

News Stream Database Name

NewsGator_NewsManager

Video Stream Database Name

NewsGator_Videos

PREVIOUS   NEXT

If you are installing any of the modules that use a separate database of their own (the **News Stream Module**, **Video Module**, and **Enrich module**), you will see a checkbox next to "**Use Same Database Server(s) for Modules**". By default this is checked, and will cause these modules to use the same host for their databases as is used for the main Sitrion Social database. Uncheck this box if you want to use a different host for any of these modules' databases; doing so will cause new host entry boxes to appear below it, one host server and one failover server for each module you're installing that has its own database.

Databases

Specify the database servers and names to install Sitrion Social.

Social Reporting Database Name

NewsGator_Reporting

News Stream Database Name

NewsGator_NewsManager

Video Stream Database Name

NewsGator_Videos

Innovation Database Name

NewsGator_Innovation

PREVIOUS   NEXT

Scroll down below the section for specifying database host servers to find a section in which you can alter the default name options for each of the databases to be installed.

Service Applications

> ⚠️ In multi-farm environments, the "Provision Social Service Application", "Provision News Stream Service Application", and "Provision Enrich Service Application" options should *only be selected when installing to the parent farm*, and must be left unchecked in the child farms.
>
> In multi-farm environments, the "Provision Video Stream Service" option should *only be selected when installing to farms which will have Video Stream enabled communities.*
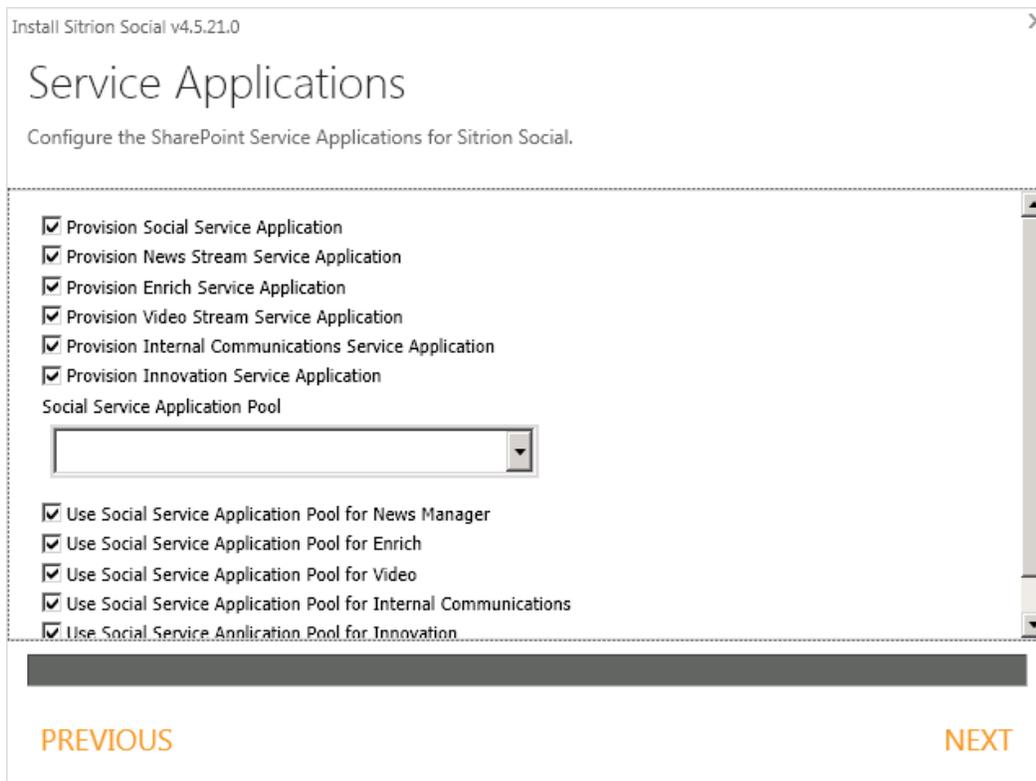
This screen appears for all new installations of Sitrion Social, but only appears for upgrades or repairs if new modules are being added that require extra information.

The **Provision Social Service Application** option allows Sitrion Social to keep the data it needs to function, and to add value by exposing additional data in the SharePoint Activity Stream and in other parts of SharePoint. Without this option, there is little to no value added in installing Sitrion Social. In multi-farm environments, the Provision Social Service Application option should *only be selected when installing to the parent farm*, and must be left unchecked in the child farms.

If you are installing the News Stream Module, the Video Stream module, or the Enrich module you'll be presented with option(s) to provision their respective services. These services are required for these features to function. However, in multi-farm environments, the options to provision these services should only be selected for some of the farms.

The options to provision the News Stream Service Application and the Enrich Service Application should *only be selected when installing to the parent farm*, and must be left unchecked in the child farms.

The option to provision the Video Stream service should only be selected when installing to farms which will have video enabled communities.
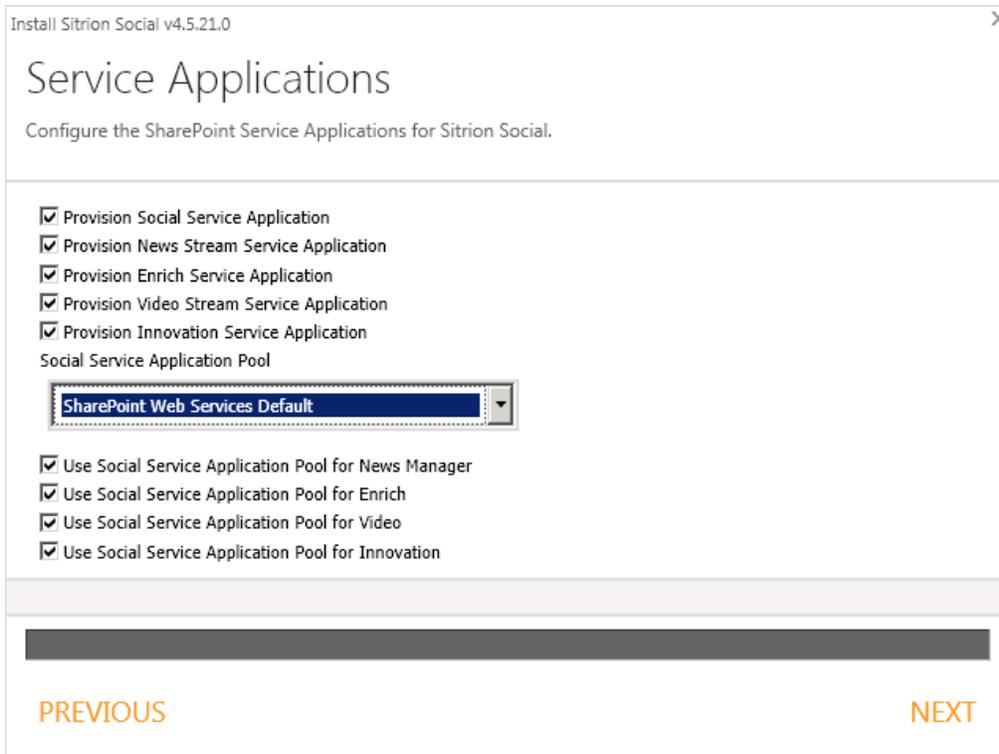
Each service application needs to have an application pool to run in, so for each service application you choose to provision on this screen, you will be prompted to specify an application pool. You may choose an existing application pool for it, or create a new one. "SharePoint Web Services System" is a safe choice. *Do not choose the Security Token Service Application Pool*.
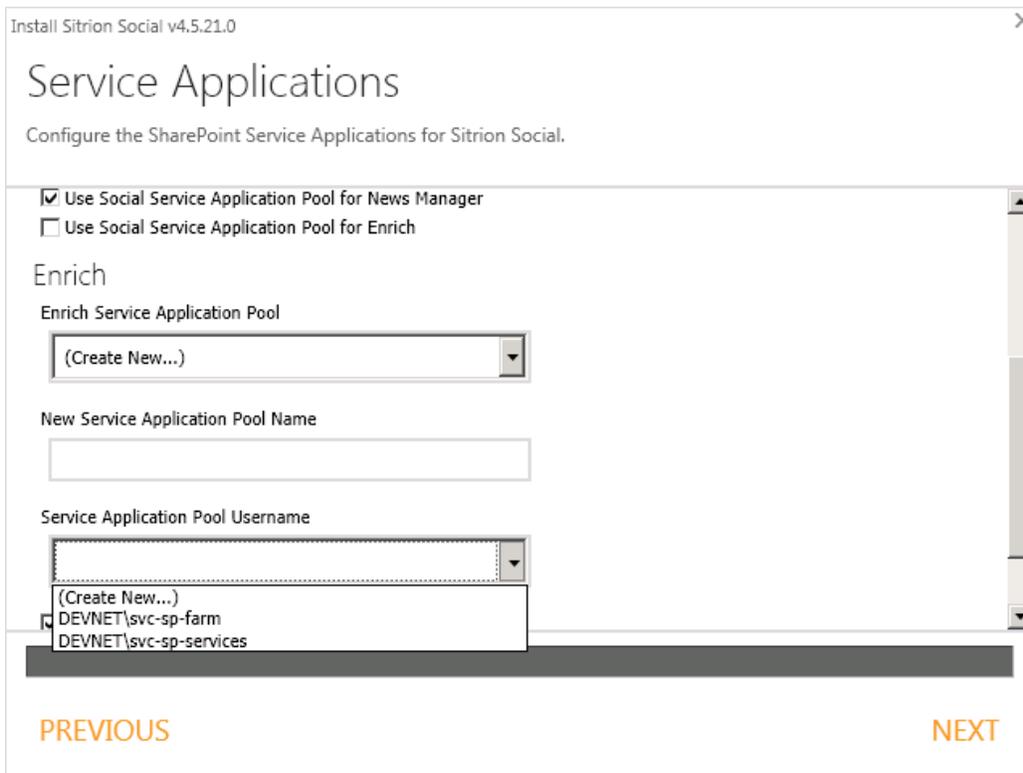
If you choose to create a new application pool, you will need to provide a name for it, and an account that the application pool will use as its security credentials. You will be provided the list of available accounts for this purpose. If you don't see the account you want to use listed, go into SharePoint Central Administration, open the Managed Accounts screen, and register the account you want to use there. You should then be able to select it in the Service Applications screen of the installer.

The Service Application service account is used by SharePoint to access the databases used by the service application. In the case of the Social Service Application, the databases are the NewsGator Social Database and the NewsGator Reporting Database. In the case of the News Stream Service Application, the database is the News Stream database; it goes similarly with the Video Stream and Enrich modules.

> ⚠️ Regardless of which choices you make here, *the account running the NewsGator Social Platform service application needs to be a farm administrator*. Otherwise there will be numerous farm properties and persisted objects that it will not be able to update.

Install Sitrion Social v4.5.21.0   ✕

Service Applications

Configure the SharePoint Service Applications for Sitrion Social.

Social Service Application Pool

[▾]

☑ Use Social Service Application Pool for News Manager
☑ Use Social Service Application Pool for Enrich
☐ Use Social Service Application Pool for Video

Video Stream

Video Service Application Pool

[▾]

> (Create New...)
> SecurityTokenServiceApplicationPool
> SharePoint Web Services Default
> SharePoint Web Services System

PREVIOUS   **NEXT**
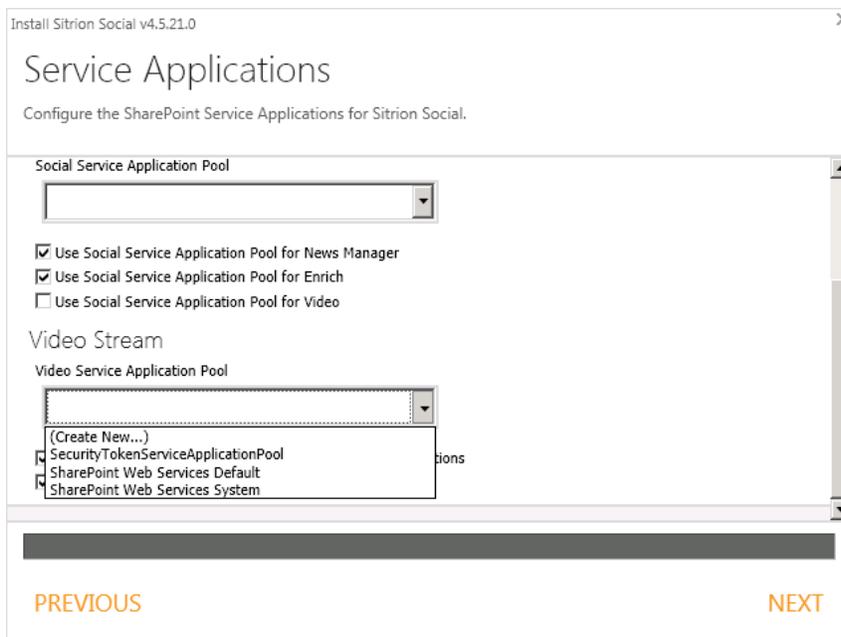
For each service application connected to a module, you will have the option of using the same application pool as is used for the Social Service Application by leaving checked the box labeled "Use Social Service Application Pool for <ModuleName>". If you'd rather use a different application pool for one of the service applications, uncheck this box, and a control for specifying an application pool for that service application will appear.

Module Options screen

If you are installing either the Enrich or the Video Stream optional modules for the first time, you'll now be presented with an Options screen. The installation of the Video Stream module is an involved process that requires several preparation steps.

NOTE: If this an upgrade please read the section below "Instructions regarding Video Stream and Enrich Upgrades".

Enrich

Enter the URL where the global knowledge base for Enrich is to be located, in **Enrich Global Knowledge Base Url.**

NOTE: To change any of the above settings after the install, go to Central Administration/Application Management/Manage Service Applications. Click on NewsGator Enrich Service Application and select Properties in the ribbon area.

Video Stream

Enter the names of the following folders that will need to be created manually before the encoding and streaming services will function:

- **Video Encoding Input Folder** - folder to store videos that are awaiting encoding

- **Video Encoding Output Folder** - folder to store videos that have completed encoding

- **Video Streaming Server Folder** - folder to store videos that will be streamed

- **Video Upload Folder** - folder that stores the uploaded files

Folders can be specified as local folders or as UNC paths. (Take note of these folder names, if they have not been created, as they will need to be specified in the Encoding Service and Streaming Server install process in the Video Stream Additional Components Installation section below.)

Scroll down to enter the streaming server address in **Video Streaming Server Url Default Zone** and optionally in the other Alternate Access Mapping zones.

NOTE: To change any of the above settings after the install, go to Central Administration/Application Management/Manage Service Applications. Click on NewsGator Video Stream Service Application and select Properties in the ribbon area.

If you would like to store the video files for the streaming server on another server or a SAN, specify these locations accordingly in the "Video Streaming Server Folder" entry box. You will then need to create a virtual folder in IIS mapping it against the physical location of the streaming server folder stored on the server or SAN. This virtual folder then needs to be specified in the Streaming Server Address. For example, if the "Streaming server folder to store videos" is \\OurSan\streamedvideos\ and it's mapped to "videos", then the Streaming Server Address specified above may have "/videos" appended to it.

To change the streaming server address to reflect a virtual folder for the streaming videos folder, for example, change the entries in the "Enter addresses…" section of the console accordingly. In the screen shot below, the "Videos" folder in the streaming server specification could well be a virtual folder. Configuring a virtual server also means updating the "Video Streaming Server Folder" field to reflect the physical location of the files that reside on another machine or SAN. This physical location should correspond to the virtual folder specified in IIS.

Below is an example of the various folders that are specified.

Install Sitrion Social v4.5.21.0   ✕

Social Sites Module Options

Configure the Sitrion Social Module Service Application options.

Enrich

Enrich Global Knowledge Base Url (Optional)

```
http://dev2k8ss2010-4.devnet.z/Kbase
```

Video Stream

Video Encoding Input Folder

```
c:\videos\input
```

Video Encoding Output Folder

```
c:\videos\output
```

Video Streaming Server Folder

PREVIOUS   NEXT

Install Sitrion Social v4.5.21.0   ✕

Social Sites Module Options

Configure the Sitrion Social Module Service Application options.

Video Streaming Server Url Default Zone

```
http://videoserver01.newcorp.com
```

Video Streaming Server Url Intranet Zone

```

```

Video Streaming Server Url Internet Zone

```

```

Video Streaming Server Url Custom Zone

```

```

Video Streaming Server Url Extranet Zone

PREVIOUS   NEXT

Installation Summary

Install Sitrion Social v4.5.21.0   ✕

Installation Summary

Confirm the Sitrion Social configuration options and select Install to proceed with the installation.

Modules
  Idea Stream
  Enrich
  News Stream
  Video Stream
  Enrich Video Scenarios
  Activity Feed Pivot Viewer
  Video Stream ScreenCast
  Innovation Solution

Web Applications
  http://dev2k8ss2010-2/

Options
  License Key

  My Site Host: http://dev2k8ss2010-2/my
  Email Handler: http://dev2k8ss2010-2/my
  Replace SharePoint My Site Newsfeed Web Parts with the Sitrion Social Activity Stream
  Enable Lookout

PREVIOUS   INSTALL

Install Sitrion Social v4.5.21.0   ✕

Installation Summary

Confirm the Sitrion Social configuration options and select Install to proceed with the installation.

  Enable Lookout
  Set Lookout as My Site Home Page
  Enrich Global Knowledge Base Url (Optional): http://dev2k8ss2010-4.devnet.z/Kbase
  Video Encoding Input Folder: c:\videos\input
  Video Encoding Output Folder: c:\videos\output
  Video Streaming Server Folder: c:\videos_streaming
  Video Upload Folder: c:\windows\temp\largeFileUploader
  Video Streaming Server Url Default Zone: http://videoserver01.newcorp.com
  Video Streaming Server Url Intranet Zone:
  Video Streaming Server Url Internet Zone:
  Video Streaming Server Url Custom Zone:
  Video Streaming Server Url Extranet Zone:

Service Application Pools
  Social Service Application Pool: SharePoint Web Services Default
  News Service Application Pool: SharePoint Web Services Default
  Enrich Service Application Pool: SharePoint Web Services Default
  Video Service Application Pool: SharePoint Web Services Default
  Innovation Service Application Pool: SharePoint Web Services Default

Databases

PREVIOUS   INSTALL

```
Install Sitrion Social v4.5.21.0                                          ×

Installation Summary
Confirm the Sitrion Social configuration options and select Install to proceed with the installation.

          Enrich Service Application Pool: SharePoint Web Services Default
          Video Service Application Pool: SharePoint Web Services Default
          Innovation Service Application Pool: SharePoint Web Services Default

      Databases
          Database Server: dev2k8ss2010-2
          Failover Database Server:
          Social Database Name: NewsGator_SocialServices
          News Stream Database Server: dev2k8ss2010-2
          News Stream Failover Database Server:
          News Stream Database Name: NewsGator_NewsManager
          Video Stream Database Server: dev2k8ss2010-2
          Video Stream Failover Database Server:
          Video Stream Database Name: NewsGator_Videos
          Innovation Database Server: dev2k8ss2010-2
          Innovation Failover Database Server:
          Innovation Database Name: NewsGator_Innovation


      PREVIOUS                                                    INSTALL
```

With all options and information needed for the install to proceed specified, the Installation Summary screen appears so that you can review your choices. Upgrades of Sitrion Social will show much less information than the install screen shown here.

Use the **Previous** button if you decide you want to change any of the listed options; otherwise, click **Install** to begin the installation process, or **Upgrade** to begin the upgrade process. If you haven't already turned off antivirus software on the server, you should do so now.

Installation Status
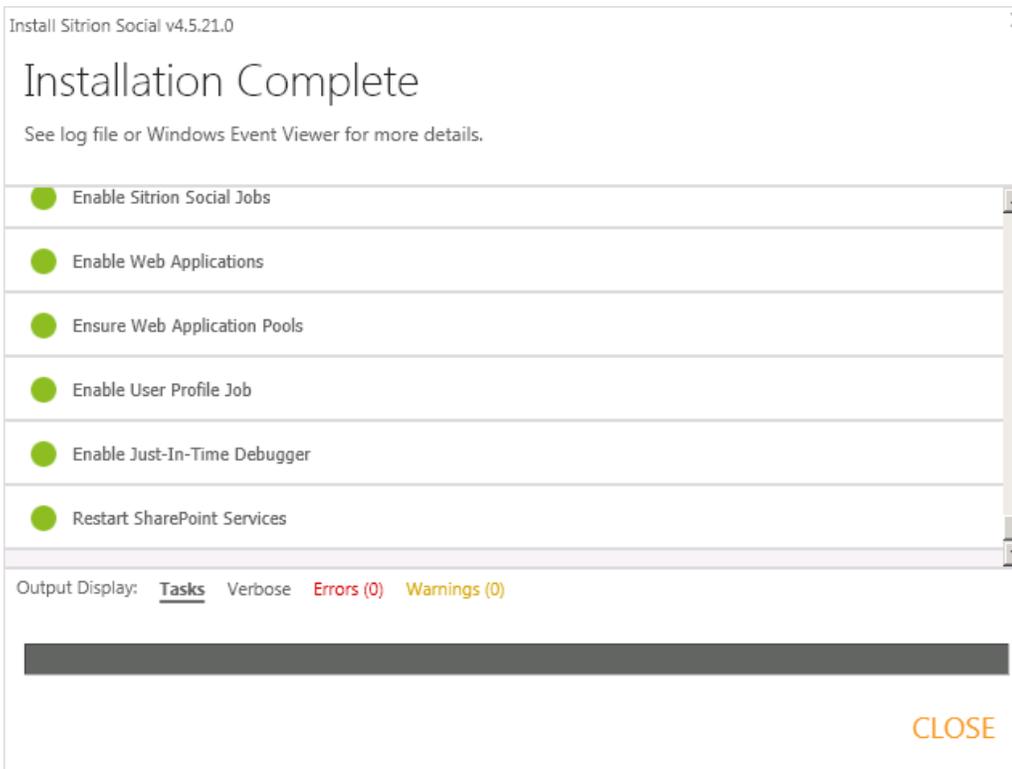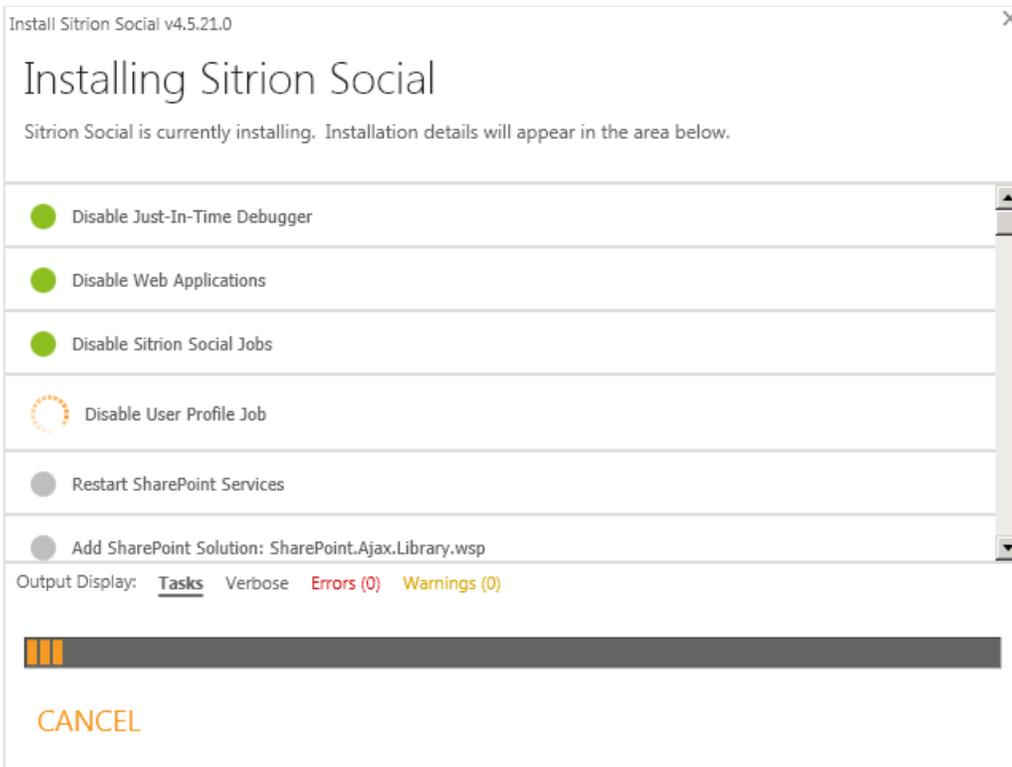
With installation underway, the Installing Sitrion Social screen appears. Each task in the installation, upgrade or repair is listed with an indication of whether it has been started or completed yet. A progress bar indicates progress through the entire installation.

⚠️ *REMINDER: If you are installing/upgrading the Video Stream Module please remember to run the "Additional Components" installer, once the primary installer finishes. Please see the "Video Stream Additional Components Installation" section below.*

If something goes wrong during install

If something goes wrong during install, you will want to:

1. Open your install log, located in the Setup folder you're running the install from.

2. Correct whatever error is reported there.

3. Repeat the install attempt.

Contact your NewsGator support representative should you need further help.

Additionally, if install has managed to create it before your error occurs, the NewsGator Social Platform management page (SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform) displays much troubleshooting information, and allows the unprovisioning and reprovisioning of many components that should be provisioned during install. See the Sitrion Social Administration Guide for full details on the use of this page.

If some solution DLLs do not get deployed to the GAC

If you end up having to manually deploy some Sitrion Social solutions into the GAC, you will need to be sure to restart the SharePoint timer service. Until you do, or until it restarts itself, any associated jobs won't run.

If some solutions fail to deploy

If on an upgrade you have solutions that are failing to deploy (these will show on the **Solution Management** page of Central Administration with a status of "Error"), it could be that some of the files the solution must update have been locked by the system. Rebooting the server to which solutions are deployed will unlock any solution files that are locked and thus preventing deployment. Retry the upgrade after rebooting.

If community activity streams aren't displaying usernames nor avatars, and 'like' and 'follow-up' don't work

The AntiXssLibrary dll most likely didn't get deployed to the GAC on the server which runs the NewsGator Social Platform Service application. Try going to Central Administration -> System Settings -> Manage Farm Solutions and deploying the SharePoint.ajax.wsp solution. From the drop down menu choose CA app. Then recycle the NewsGator backend app pool.

Workarounds for Known Issues with Enrich Module

Knowledge Base pages may crash after Enrich has been upgraded to 4.1

In some upgrade scenarios, the Enrich Service Application is not available after upgrade. This may cause an "Add a Knowledge Base" form or the Knowledge Base tab to crash. To address this, delete and re-create the Enrich Service Application.

If you upgraded from Sitrion Social v4.0 and have the Internal Communications solution

The v4.0 Internal Communications solution configures a "Person" tile for you. In v4.1 and up this needs to be replaced by the new Internal Communications Tile, however the installer is not able to perform this replacement. In order to swap out the tiles currently assigned to users, a SQL update needs to be run on the backend SQL Server for Sitrion Social. Please contact NewsGator Services for a copy of the SQL which needs to be run.

Video Stream Additional Components Installation

If installing the Video Stream module, an additional installation process must be performed now that the core installation has been completed. This will install the encoding server and streaming servers. These are distributed by an installer that is separate from the Sitrion Social installer. Neither of these two components requires SharePoint to be installed on the same server.

It is advisable to install the Encoding Service on a server separate from the SharePoint farm.   The Encoding Service will have high CPU usage which could interrupt service to any other applications hosted on the same server.

The Streaming Server can be installed onto a dedicated streaming server or a SharePoint server.

For Software Prerequisites, refer to "Before You Begin – Software prerequisites" in this manual.

For a summary of all of the relevant SharePoint features supporting Video Stream, see **Appendix M - Video Stream SharePoint Features** within this document.

If you have Kontiki and want to use it to handle streaming, please see **Appendix O - Sitrion Social Video Stream 5.0 Integration with Kontiki**.

Install Instructions

The Video Stream Additional Components installer comes with the WSP file as a "setup.exe".   Copy this file to the encoding and streaming servers you are installing to.

When the installer first starts you will see 3 options. If this is a new install click the "Install" button.
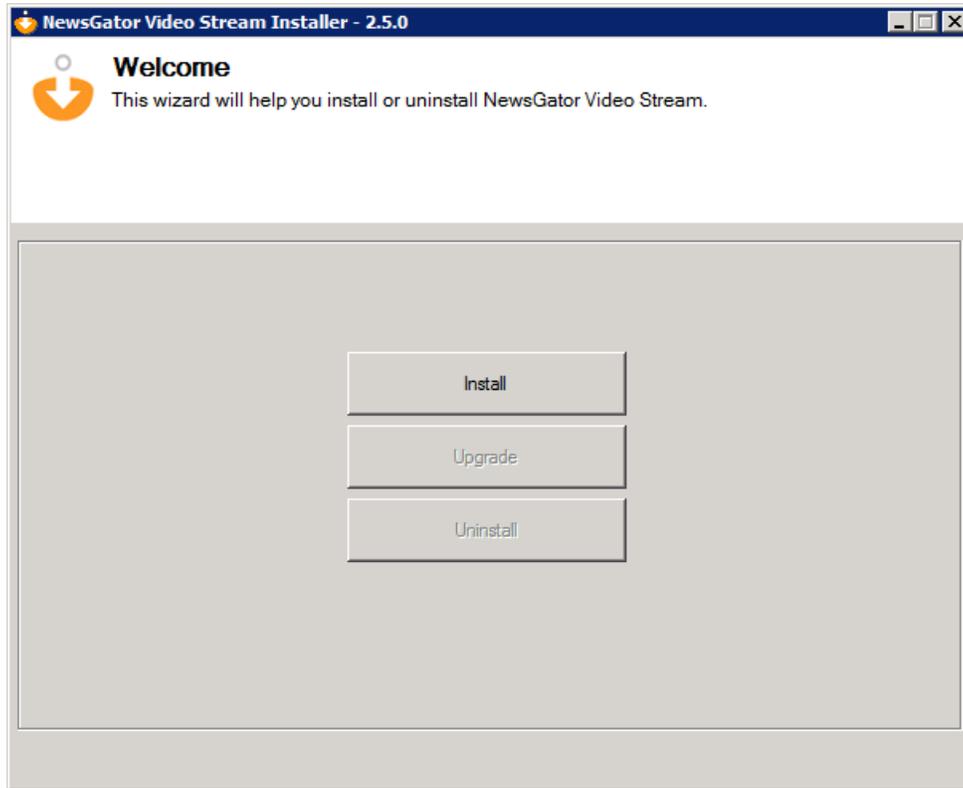
Database Configuration

The SQL Server connection parameters entered here will be used by Video Streaming Server and Encoding Service.

SQL Server Name is the name of the server hosting the Video Stream database.

Note: This should be the same server entered into the Sitrion Social Installer Video Stream options page.

Video Stream Database Name is the name of the server hosting the Video Stream database.

Note: This should be the same database name entered into the Sitrion Social Installer Video Stream options page.

Encoding Service

The Encoding Service can be optionally installed by checking the "Install Encoding Service" checkbox.

The Installation Folder is used to configure the directory where the Encoding Service will be installed.

The Encoding Service Identity section is used to set the Account under which the Encoding Service will run.

This account needs to have read/write access to the input and output encoding directories.

Also, this account needs dbowner role on the Video Stream database.

Streaming Server

The Streaming Server can be optionally installed by checking the "Install Streaming Server".

The Physical Path option is used to configure where the Streaming Server website will be created.

This folder will be the one pointed to be the Streaming Directory (local path or UNC) configured in the Sitrion Social installer. See the "Steps before Installing" section.

The installer can optionally create the required website in IIS. Check the "Create web site" check box if the installer should create this web site. Currently, the streaming server needs to be on the same domain as the SharePoint server. For example, if SharePoint is running on *sperver.com*, then a video sub-domain could be *video.spserver.com*. While any available port can be used for the streaming server, we recommend using port 80 to avoid issues with corporate firewalls.
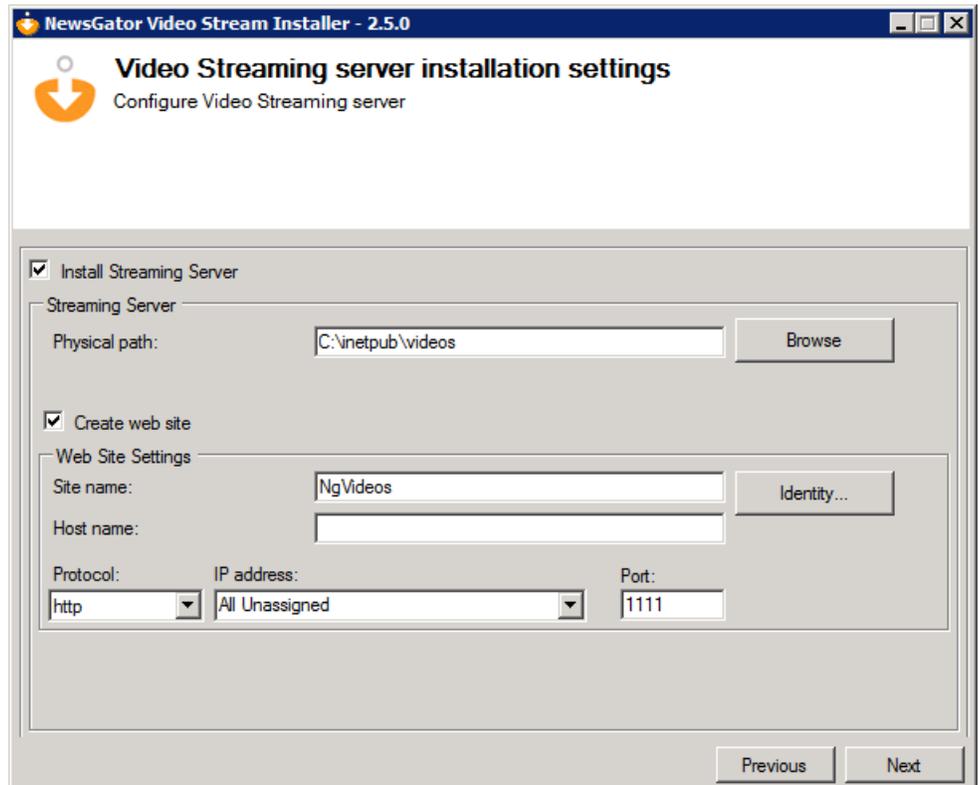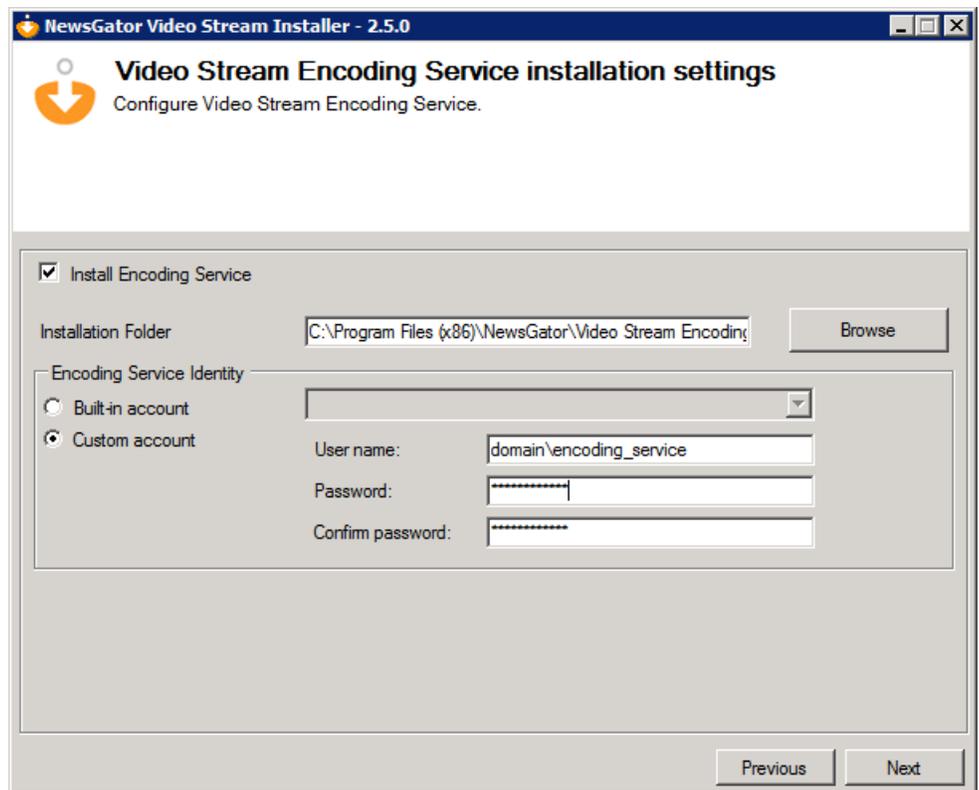
The options in the Web Site Settings section are the same options available from the IIS Management Console. The options chosen here are exactly analogous to creating a new web site in the IIS Management Console. *The settings chosen here must match the Streaming Server address specified in the Sitrion Social installer*.

The Identity button can be used to set the Identity of the Streaming Service website's application pool. This account will need read access to the Physical Path folder. The default identity is normally sufficient.

Installing Progress

This screen shows the progress of the installer as it progresses through the install. A check mark will be displayed for each task as it finished successfully.

If any errors are encountered, they will be displayed here.
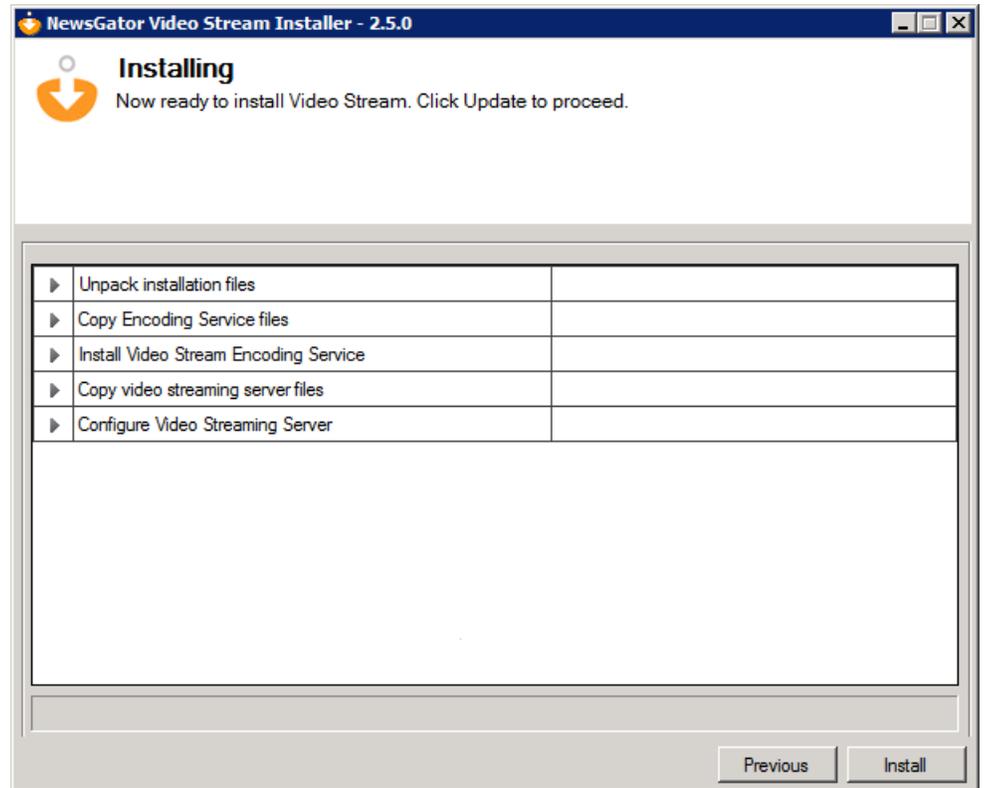
If something goes wrong during the Video Stream additional components install

If something goes wrong during install, you will want to:

1. Open your install log, located in the Setup folder you're running the update from.

2. Correct whatever error is reported there.

3. Repeat the update attempt.

Contact your NewsGator support representative should you need further help.

Installation Next Steps

Antivirus software

Now that you're done installing or updating Sitrion Social, turn on your antivirus software on the server if you have previously turned it off.

Stop back-end services on web front ends

By default, every install leaves the Sitrion Social backend services running on all servers in the farm, even the web front ends. From Central Administration, go to Application Management, Manage Services on Server, and find these two NewsGator services:

- NewsGator Social Application Services
- NewsGator Social Platform Services v2

At the top of the page, click on the Server dropdown and select Change Server. Choose a web front end server, then stop both of these services. Repeat for each web front end.

Next steps for Multi-farm Installations

Stop Social Application back-end service on child farms

Because you're not running the Social Platform service application on the child farms, you don't need the NewsGator Social Application Services backend service on any of the servers on a child farm. While you're stopping this service on the web front ends on child farms (see previous step), also stop it on the other servers of the child farms.

Connect child farms to the parent's service applications

For Sitrion Social to work properly in a multi-farm environment, the child farms must connect to the parent farm's NewsGator Social Platform Service. For installations with the News Stream module, they must additionally connect to the parent farm's NewsGator News Stream Service. This is a two-step process that consists of

1. publishing the services from the parent farm
2. connecting to the services from each child farm

Please consult **Appendix G: Connecting Child Farms to NewsGator Services on the Parent Farm** for detailed instructions on performing these steps.

Grant Delegation and Impersonation rights to all consumer farm app pool identities

To talk properly back to the parent farm, the app pools in consumer farms must have Delegation and Impersonation rights granted. Gather a list of all app pool identities in the consumer farms, then proceed as follows:

1. Open SharePoint Central Administration.
2. Under the **Application Management** area, click the **Manage Service Applications** link.
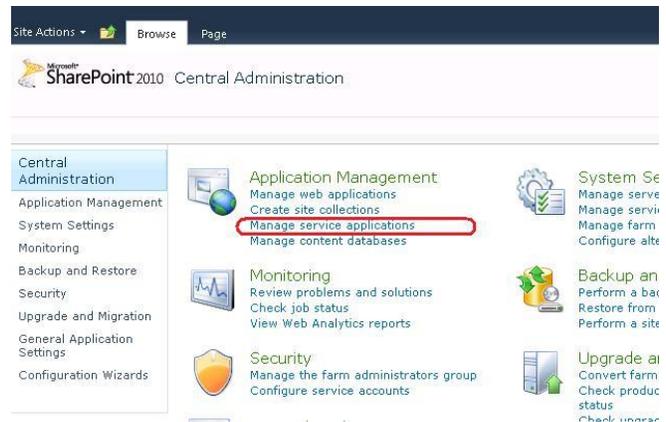
3. From the list that appears, select the service application of type **NewsGator Social Platform Services** (but do not click on the name itself, which navigates away to a different page).
4. In the menu area, click **Administrators**.
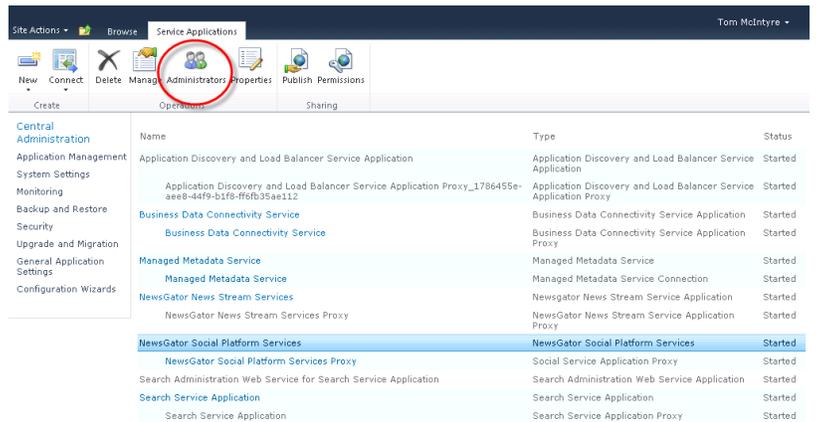
A dialog window titled **Administrators for NewsGator Social Platform Services** displays.

5. Type the name of all the app pool accounts that you want to grant permission to, with domain name, in the box at the top of the dialog.
6. Click the "Check user" icon below the box to validate the account names you typed. When you have it correct, click the **Add** button.
7. Selecting each account in turn in the middle box, check **Delegation and Impersonation i**n the **Permissions …** box at the bottom.
8. Click **OK** to close the dialog.

Turning on and configuring diagnostic logging

Unless you are upgrading or repairing and had previously turned on diagnostic logging, by default Sitrion Social will log errors, but not warnings. NewsGator recommends you change this setting so that warnings are logged as well. To do so, follow the instructions in **Appendix E: Adding Warnings from Sitrion Social to the Event Log**.

Create an SSL Alternate Access Mapping (SharePoint 2013 only)

If you have installed Sitrion Social to SharePoint 2013 and had not previously followed the instructions in the section above titled **SSL Alternate Access Mapping required for 2013**, then you should do so now.

Define what "Public" means for Communities

This step only applies to new installs, or to upgrades from versions of Sitrion Social before verion 2.0. As of version 2.0, Sitrion Social allows you to specify what security principals should represent your "public" access. This is done in Central Admin in the NewsGator Social Platform Services management page. The security principals you specify become part of a SharePoint group called **Public Community Members**. When a public community is created, this group is automatically added with read privileges. The creator can also easily opt to add this SharePoint permission group with contribute privileges, in addition to granting it permission using the normal SharePoint methods.

On installation, this group contains, by default, the highest level public principals that apply on your server. To change which security principals comprise this group, click **Manage Public Community Members** in the Community and Spheres section of the NewsGator Social Platform Management page.
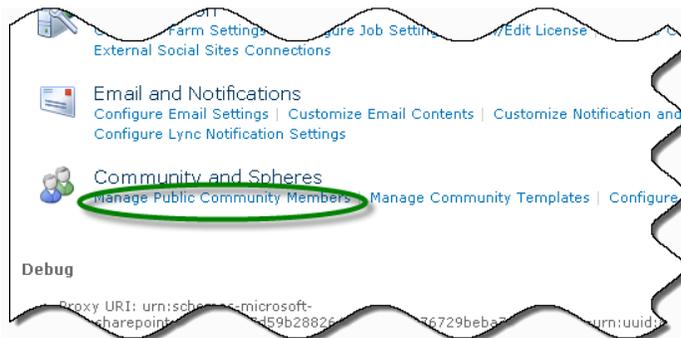
This opens an edit box displaying the current security principals that comprise the Public Community Members group:
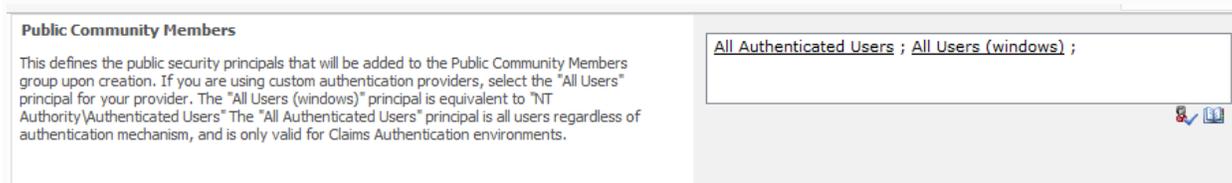
If you are using custom authentication providers, make sure you have in this box the principal that, for your provider, represents All Users. The "All Users (windows)" principal is equivalent to "NT Authority\Authenticated Users". The "All Authenticated Users" principal is all users regardless of authentication mechanism, and is only valid for Claims Authentication environments.

When adding principals to this list, these additions will also be automatically made in all existing instances of the Public Community Members group in existing site collections and sites. Removal of principals from this list will not be synchronized to existing instances of the Public Community Members group, and so if desired, removal of the principal from existing instances the group will have to be repeated manually in each site collection.

Create an admin site

Unless you just performed an upgrade or repair and had already created an admin site, NewsGator strongly suggests you now create an admin site by creating a new site collection in SharePoint Central Administration using the NewsGator Administration template (see **Appendix D: Creating a Sitrion Social Admin site** for detailed instructions on doing this). This creates a site collection containing a site from which broadcasts can be sent (a special kind of conversation item that is highlighted and that goes to the top of each user's activity stream and remains there until cleared by the user), and containing another site that displays globally-scoped reports on user activity. Each of these two sites has independent permission settings, which in normal use you would set to be exposed only to your chosen management or administrative personnel.

Deactivate feature from web applications to which Sitrion Social was not deployed

There is a web-application-level feature that you will want to deactivate on web applications to which you have not deployed Sitrion Social. The feature is called the **NewsGator SharePoint Actions Integration Feature**. If left active on web applications that don't have Sitrion Social installed, you will likely see errors like the following in your event logs when users without profiles access those web applications:

> 0x35DC NewsGator Social Sites   BackendServices   1001 High   Error connecting to the User Profile Service creating a user profile for ...

To deactivate this feature, in SharePoint Central Admin click the **Manage Web Applications** link in the Application Management section. Select the web application, then click **Manage Features** in the ribbon. A dialog box will display the web application features; deactivate the NewsGator SharePoint Actions Integration Feature.

Activate web part features in site collections

Unless you just performed an upgrade or repair and did not add any new modules when doing so, there will be new web parts that you'll want to add to the web part galleries of some of your site collections. The core solution of Sitrion Social adds three site collection features to every site collection (NewsGator Social Web Parts, NewsGator Community Web Parts, and NewsGator Pivot Viewer Web Parts) that each, when enabled, add some web parts to the site collection's web part gallery. If you've installed or added any optional modules that include their own web parts, each of these will have added a similar site collection feature for adding its web parts to the gallery. For example, if you added the News Stream Module, there will be a site collection feature called "NewsGator News Stream Web Parts". Usually, these features are deactivated by default. You will have to activate the feature on any site collection in which you want to deploy any of the corresponding web parts. For full details on what these web part features are named and what web parts they deploy to the gallery, see the section titled **Web Part Deployment** in the **Sitrion Social Administration Guide**.

For new installations with Spotlight

NOTE: For new installations, we recommend you deactivate and then reactivate the NewsGator Spotlight Installer feature in the Farm Features portion of Central Admin after your installation completes. This avoids intermittent issues we have seen with Spotlight.

When running Spotlight in SSL environments

If you are running in an SSL environment, you must add the SSL certificate from the root CA to the SharePoint certificate store, or else the Spotlight Processing Job will fail with an error like the following:

> Error generating user profile cache for spotlight. System.Net.WebException: The underlying connection was closed: Could not establish trust relationship for the SSL/TLS secure channel. --->

System.Security.Authentication.AuthenticationException: The remote certificate is invalid according to the validation procedure.

This can be done in Central Administration -> Security -> Manage Trusts -> New.

If you upgraded from Sitrion Social v4.1 or earlier to v4.5 or later and are using BDC Search

As of the 4.5 release, the Social Search BDC Model to integrate with SharePoint search has been changed. Consequently, after upgrading from any version prior to 4.5 to 4.5 or later, the search integration will need to be setup again.

If you upgraded from Sitrion Social v1.1

> ⚠️ When upgrading from 1.1 to higher versions of Sitrion Social (then called "Social Sites"), any users that had been granted the Delete Events permission in the NewsGator Social Platform Services application will lose that permission. After completing update, you'll need to regrant this permission to anyone that should retain it. See Appendix F: How to Grant Rights to Delete All Events for full details on how to do this.

If you upgraded from Sitrion Social v1.x, re-enable optional platform features

If you upgraded from any version of Sitrion Social (then called "Social Sites") before 2.0, some platform features you've enabled will become disabled. These include "Activity Authors Can Delete Comments", "Append user's full name After @target", and "Enable Terms of Use". Go to the NewsGator Social Platform Management page and re-enable these (as described in the **Social Sites v3.5 Admin Guide**).

Run full crawl of the social content source (especially for upgrades from 2.0)

In some cases, incremental crawls of the social content source (the BCS content source of public microblogs, questions, comments and answers that was introduced in 2.0) did not pick up new or changed items. This issue was corrected in the 2.1 release. We recommend customers run a full crawl of this content source upon install of v2.1 or higher, especially for upgrades from 2.0.

Upgrading with Customized Email Template

This section applies to two scenarios: whether you had a customized email digest template or a customized Email Instant Notification template.

Upgrades from Sitrion Social v2.0 to 2.1 and higher

If you upgraded from Sitrion Social (then called "Social Sites") v2.0 and had a customized Email Digest template, your customized template is kept, so you won't get new lines that were added to the default template that provide the new "View" link feature in posts. To add these new lines to your customized template, find the lines that generate the "Comment" link. To the end of that line add this:

```
<xsl:if test='EmailXsltFunctions:ShowViewLink(atom:link[@rel="self"]/@href)'> | <xsl:value-of
select='EmailXsltFunctions:GetViewLink(atom:link[@rel="self"]/@href)' disable-output-
escaping='yes'/></xsl:if>
```

Basically in v2.1 we added two new methods to our helper class:

EmailXsltFunctions:ShowViewLink which looks at a url string and returns true if it's the url of an event we want to display.

EmailXsltFunctions:GetViewLink which takes the view link URL and returns a nicely formatted and localized <a> tag to display.

Upgrades from Sitrion Social v2.1 or lower to 2.5/2.6 or higher

If you upgraded from any version of Sitrion Social (then called "Social Sites") prior to v3.0 and had a customized Email Digest template or had a customized Email Instant Notification template, your customized template is kept, so you won't be able to take advantage of the changes made to the Digest Email functionality in 2.5/2.6 unless you make changes to your template along the lines of those listed below. However, there were several additions to the output XML and consequent changes to the XSLT. We suggest that customers consider downloading the default XSLT and study it to understand the changes we've made. It may be easier to download our updated template and apply customer specific changes to it rather than trying to update the customer's custom template.

The biggest changes between the 2.1 release and the 2.5/2.6 release are:

- Added a function to URI encode URIs (there isn't a default XSLT way to do this and some email clients want it.)
- Displaying polls
- Displaying attachments
- Added Like link to posts
- Added Follow-up link to posts
- Added Mute link and message to bottom of email (Instant Notification emails only)

The function to URI encode URIs can be added to any URI (For example where they show atom:author/atom:uri)

```
        <xsl:value-of select="EmailXsltFunctions:UriEncode(atom:author/atom:uri)" disable-output-
  escaping="no"/>
```


The code for displaying polls is as follows:

```
    <xsl:template match="ng:pollOption">
     <li style="padding: 3pt 3pt 3pt 3pt; border-bottom: 1px dotted #ddd;">
      <div>
        <xsl:value-of select="ng:name"/>:
        <xsl:choose>
         <xsl:when test="ng:count=1">
          <xsl:value-of select="ng:count"/><xsl:text> </xsl:text><xsl:value-of
    select='EmailXsltFunctions:GetLocalizedString("Vote")'/>
         </xsl:when>
         <xsl:otherwise>
          <xsl:value-of select="ng:count"/><xsl:text> </xsl:text><xsl:value-of
    select='EmailXsltFunctions:GetLocalizedString("Votes")'/>
```

```
          </xsl:otherwise>
        </xsl:choose>
      </div>
    </li>
  </xsl:template>
```

Here's an example of displaying an attachment:

```
<!-- ATTACHMENT -->
<xsl:if test='atom:link'>
  <xsl:choose>
    <xsl:when test="atom:link/@ng:websize">
      <a href="{atom:link/@href}" title="{atom:link/@title}">
        <img src="{atom:link/@ng:websize}" alt="{atom:link/@title}" />
      </a>
    </xsl:when>
    <xsl:when test="atom:link[@rel='enclosure' and starts-with(@type,'image/') and @length &lt; 150000]">
      <a href="{atom:link/@href}" title="{atom:link/@title}">
        <img src="{atom:link/@href}" alt="{atom:link/@title}" />
      </a>
    </xsl:when>
    <!--<xsl:when test="atom:link[@rel='enclosure']" >
      <a href="{atom:link/@href}" title="{atom:link/@title}">
        <xsl:value-of select="atom:link/@title"/>
        <xsl:text disable-output-escaping="yes">XXX</xsl:text>
      </a>
    </xsl:when>-->
    <xsl:otherwise>
      <a href="{atom:link/@href}" title="{atom:link/@title}">
        <xsl:value-of select="atom:link/@title"/>
      </a>
    </xsl:otherwise>
  </xsl:choose>
</xsl:if>
```

Here's an example of displaying a Like link:

```
<xsl:if test="ng:allowActions/ng:like">
  <xsl:if test='EmailXsltFunctions:ShowLikeLink(atom:link[@rel="self"]/@href)'>
    | <xsl:value-of select='EmailXsltFunctions:GetLikeLink(ng:eventKey)' disable-output-
escaping='yes'/>
  </xsl:if>
</xsl:if>
```

Here's an example of displaying the "Mute" link (Instant notification emails only):

```
<span style='font-size:9pt;'>

  <xsl:text disable-output-escaping="yes">&amp;nbsp;</xsl:text>
```

```
        <xsl:value-
of select='EmailAlert:GetUnsubscribeThisEventLinkAndText(atom:entry/ng:eventKey)' disable-output-
escaping='yes'/>

        </span>
```

Upgrades from any version of Sitrion Social prior to v3.0

If you upgraded from any version of Sitrion Social (then called "Social Sites") prior to v3.0 and had a customized Email Digest template, your customized template is kept, so you won't be able to take advantage of many of the changes made to the Digest Email functionality in 3.0 unless you make the changes listed below to your template. These modifications were required to make the XML output more extensible in the future and to add further functionality.

Steps 1 through 5 are required, and email digest functionality will stop working if these are not implemented:

1) Add a new namespace to the template xmlns:digest="uri://newsgator.com/social/digest"
2) Replace references to the element named atom:groupName with digest:name
3) Replace references to the element named atom:colleagueName with digest:name
4) Replace references to the element named atom:colleagueRecordId with digest:id
5) Replace references to the element named atom:groupId with digest:id

The remaining steps add new functionality. Though they may be considered optional, they are part of the standard email digest functionality in all new installations of Sitrion Social from version 3.0 going forward.

6) Add a section to call the template for the new chronological ordering option. By default it is in the root (/digest) template and looks like this:
```
            <xsl:if test="count(ChronologicalFeed/atom:feed)">
             <!--All activity in chronological order-->
              <xsl:apply-templates select="ChronologicalFeed/atom:feed">
              </xsl:apply-templates>
             </xsl:if>
```
7) Add a template for the new chronological ordering option. By default it looks like this:
```
            <xsl:template match="ChronologicalFeed/atom:feed">
              <xsl:if test="count(atom:entry) > 0">
               <div>
                <table cellpadding="5" cellspacing="0" width="100%">
                 <xsl:apply-templates select="atom:entry">
                  <xsl:sort select="atom:updated" order="ascending"/>
                 </xsl:apply-templates>
                </table>
               </div>
              </xsl:if>
            </xsl:template>
```
8) Add code to the root (/digest) template to call the template for the new "My Activities" content source. By default it looks like this:
```
            <xsl:if test="count(ConversationFeed/atom:feed)">
             <div>
              <h1>
                <xsl:value-of
        select='EmailXsltFunctions:GetLocalizedString("DigestEmailMyActivityHeading")'/>
              </h1>
             </div>
             <!--All activity in chronological order-->
             <xsl:apply-templates select="ConversationFeed/atom:feed">
             </xsl:apply-templates>
```

```
          </xsl:if>
```
9) Add a template to display the new "My Activities" content. By default it looks like this:
```
        <xsl:template match="ConversationFeed/atom:feed">
          <xsl:if test="count(atom:entry) > 0">
            <div>
              <table cellpadding="5" cellspacing="0" width="100%">
                <xsl:apply-templates select="atom:entry">
                  <xsl:sort select="atom:updated" order="ascending"/>
                </xsl:apply-templates>
              </table>
            </div>
          </xsl:if>
        </xsl:template>
```
10) There is a new helper function to display the logo of a community if it has one. It can be used like this:
```
        <xsl:value-of select="EmailXsltFunctions:GetSocialGroupLogoPictureCid(digest:id, digest:imageUrl)"/>
```
11) The elements atom:entry and ng:comment can now have a child called ng:LinkPreviewInfo. The default template to render it looks like this:
```
        <xsl:template match='ng:LinkPreviewInfo'>
          <table>
           <tr>
             <td width="5"> </td>
             <td colspan="1">
               <xsl:if test="ng:ThumbnailUrl">
                 <a href="{ng:Url}" title="{ng:Title}">
                   <img src="{ng:ThumbnailUrl}" alt="{ng:Title}">
                     <xsl:choose>
                       <xsl:when test="ng:ThumbnailLandscape='false'">
                         <xsl:attribute name="height">125</xsl:attribute>
                       </xsl:when>
                       <xsl:when test="ng:ThumbnailLandscape='true'">
                         <xsl:attribute name="width">125</xsl:attribute>
                       </xsl:when>
                     </xsl:choose>
                   </img>
                 </a>
               </xsl:if>
             </td>
             <td colspan="2">
               <a href="{ng:Url}" title="{ng:Title}">
                 <xsl:value-of select="ng:Title"/>
               </a>
               <br></br>
               <xsl:value-of select="ng:Summary"/>
             </td>
           </tr>
          </table>
        </xsl:template>
```

Upgrades from Sitrion Social v3.0 or v3.1

There should be no changes required to your customized template to maintain full email digest functionality when upgrading from Sitrion Social (then called "Social Sites") v3.0 or v3.1.

Instructions regarding Video Stream and Enrich Upgrades

Video Stream Upgrade Instructions

NOTE: IF ENRICH IS INSTALLED, YOU MUST UPGRADE ENRICH AT THE SAME TIME. FAILING TO DO SO MAY CAUSE ERRORS.

1. Place the VideoStream specific WSP files into the SocialSites installer's "Solutions" folder as per normal.
2. Follow the upgrade steps for Sitrion Social as described above.
3. Copy the Additional components installer folder to machines that are running the VideoStream Encoding Service and/or the Streaming Service components.
4. On each server run the "Setup.exe" executable in the folder you copied in step 3. Click upgrade and follow the usual steps to upgrade the additional components as described below in the Video Stream Additional Components Installation.
5. Once these steps are completed you should be upgraded.
6. You can verify the installed version by going to http://yourvideostream/test.aspx which should indicate the version as <version you installed> (for example 3.0)
7. **If you are upgrading from a version prior to 2.0.3**, please follow the "Installation instructions for Video Stream 2.0.3" steps starting at **step 4** in the Video Stream 2.0 Release Notes.

Enrich Upgrade Instructions

NOTE: IF VIDEO STREAM IS INSTALLED, YOU MUST UPGRADE VIDEO STREAM AT THE SAME TIME. FAILING TO DO SO MAY CAUSE ERRORS.

1. Place the Enrich specific WSP files into the SocialSites installer's "Solutions" folder as per normal for modules.
2. Follow the upgrade steps for Sitrion Social as decribed above but note that:
   a. Video Scenarios will be automatically installed if Enrich and VideoStream are both installed on the farm.
   b. If installing the Video Scenario component of Enrich the install instructions for Video Stream must also be followed.

Uninstalling Sitrion Social

When to uninstall

Uninstall Sitrion Social only when you are completely done using the product.

> ⚠️ You should not uninstall Sitrion Social unless you are done using the product. If your intention is to upgrade, use the upgrade path instead (see the "Updating (Upgrading) Sitrion Social" part for instructions). This is because, even though you may have kept your content databases when uninstalling, after reinstall you will have to manually activate the Community Web feature in every existing community if you want community list events to appear in the community event stream. You will also have to re-activate the Integration feature on any lists that are not part of a community for which you want events appearing in the activity stream. When upgrading Sitrion Social (versus choosing an uninstall/reinstall sequence), the event receivers that these features attach are kept, so no feature reactivations are necessary.

Open the Launcher

Log in to your Applications server (usually the same as your Central Administration server, but not necessarily the same) using an account that meets the pre-requisites above, and launch **Launcher.exe** from the Sitrion Social Setup

folder provided to you by NewsGator Support. If User Account Control is active on this server, you'll need to launch this by right-clicking on Launcher.exe and choosing "Run As Administrator" from the drop-down menu. This will display the **Sitrion Social Launcher.**
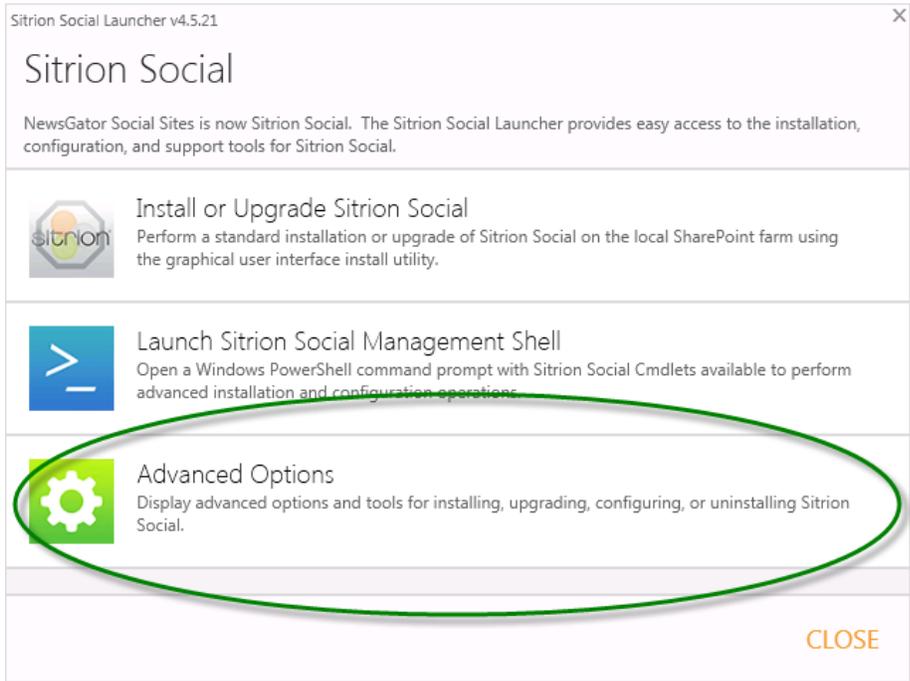
Click **Advanced Options**, and then after a warning message is cleared, click **Uninstall Sitrion Social**. You'll see another message warning of how many sites may be negatively affected by the uninstall. If you still want to proceed with uninstall, click **Yes**.
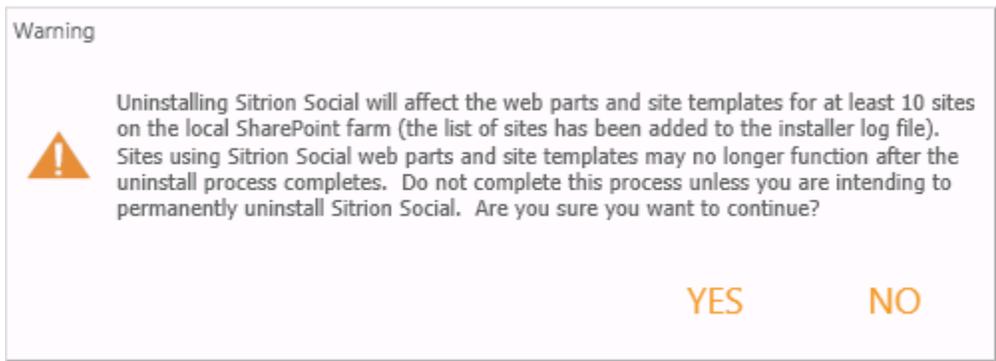
The **Uninstall Summary** screen appears:

Install Sitrion Social v4.5.21.0 ✕

Uninstall Summary

Select Uninstall to proceed with Uninstalling Sitrion Social.

☐ Delete Databases
Use this option to delete the Sitrion Social databases when uninstalling.

Uninstalling Sitrion Social will disable Sitrion Social features, remove Sitrion Social service applications, and remove Sitrion Social solutions from the SharePoint farm.

CANCEL   UNINSTALL

On this screen, checkin the **Delete Databases** option will cause the NewsGator social database and the NewsGator reporting database to be deleted during the uninstall process. If you don't intend to use Social Sites again on the farm, and won't have any use for the activity data added by Social Sites to SharePoint's native activity data, you may safely delete these databases. Otherwise you should leave this option unchecked. The databases may be later deleted directly from SQL Server.

If you are done using Sitrion Social and wish to use it no more, click the **Uninstall** button. If you haven't already turned off antivirus software on the server, you should do so now, before clicking **Uninstall**.

Uninstalling screen
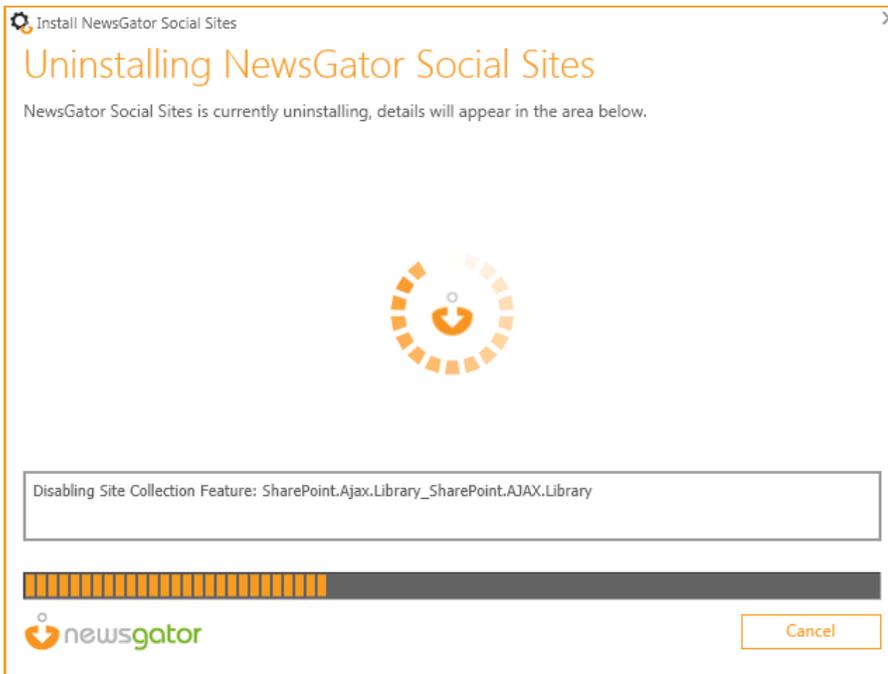
With uninstallation underway, the **Uninstalling Sitrion Social** screen appears. The details area elaborates on the current step of installation, upgrade or repair. A progress bar indicates progress through the entire uninstallation.

Additional uninstall steps for Video Stream module

If you installed the Video Stream module, there are required steps remaining to finish the uninstall process. Un-installation of Video Stream's additional components can be completed by selecting the Uninstall option when running the Additional Components Installer.

If something goes wrong during uninstall

If something goes wrong during uninstall, you will want to

1. Open your install log, located in the Setup folder you're running the uninstall from.

2. Correct whatever error is reported there.

3. Repeat the uninstall attempt.

Additionally, if uninstall has not managed to remove it before your error occurs, the NewsGator Social Platform management page (SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform) displays much troubleshooting information, and allows the unprovisioning and reprovisioning of many components that should be removed during uninstall. See the Sitrion Social Administration Guide for full details on the use of this page.

Occassionally after following the above steps, there will still be a component of Sitrion Social that uninstall cannot remove. In such cases, the following steps will enable you to manually uninstall Sitrion Social:

- Stop all the NewsGator Timer Jobs
- Remove the NewsGator Service Applications (you can choose to keep the data if you wish)
- Deactivate the NewsGator Farm Features

- Retract the NewsGator Solutions
- Remove the NewsGator Solutions
- Check the GAC to make sure all the NewsGator files are gone
- Reset the SharePoint Timer Job Service (windows services menu)
- Reset IIS

Contact your NewsGator support representative should you need further help.

Uninstalling a Sitrion Social Module

Though we do not recommend uninstalling individual solutions from a SharePoint farm, there may be circumstances in which you need to uninstall a Sitrion Social module. Please note that SharePoint is not very good at cleaning up files and content after solutions have been removed from a SharePoint farm. If any issues arise after removing a solution from SharePoint, manual intervention may be required.

To remove a Sitrion Social module, launch the Sitrion Social Management Shell from the Sitrion Social install utility. Use the *Remove-SocialSitesModules* PowerShell Cmdlet to perform the operation. For a full list of available parameters for the Cmdlet, use the *Get-Help Remove-SocialSitesModules* Cmdlet, or see Appendix K of this document.

Making changes to your installation

Adding Modules after Sitrion Social is installed

If you install Sitrion Social, then later purchase additional modules to provide added functionality, you may face one of three possible deployment scenarios for the new modules:

1. **You are given a new Setup folder of a version matching the build of Sitrion Social you currently have installed.**

   In this case you should follow the instructions for Repair, above. When you get to the Modules Selection screen, be sure to check the new module(s).

2. **You are given a new Setup folder of a newer version than the build of Sitrion Social you currently have installed.**

   In this case you should follow the instructions for Upgrade, above. When you get to the Modules Selection screen, be sure to check the new module(s).

3. **You are given some .wsp files only.**

   In this case you'll need the Setup folder you used when last installing or updating Sitrion Social. Within that folder is another folder called "Solutions". Copy the .wsp files into this "Solutions" folder, then follow the instructions for Repair, above. When you get to the Modules Selection screen, be sure to check the new module(s).

Creating Web Applications after Sitrion Social is Installed

If you create a new web application in your farm after having installed Sitrion Social, you will need to take some manual administrative steps to ensure Sitrion Social is fully deployed to the new web application.

1. Open SharePoint Central Administration.

2. Go to the **System Settings** section

3. In the Farm Management section, click **Manage Farm Solutions**

4. Identify any NewsGator solutions that do not show as "Globally Deployed". Include **sharepoint.ajax.library.wsp** with these.

5. Open each of these in turn, and

   a. Click **Deploy Solution**

   b. Set the dropdown in the **Deploy To?** section to the new web application

   c. Click **OK**

Changing settings made during install

If you later decide to change any of the settings you configured during install, run setup again using the same Setup folder you used before, then proceed as above. In going through this "repair" process, you will be able to change some of the settings you made. Some of these settings you can also change without having to run Setup again. The following table lists these settings; you can get more details on these in the Sitrion Social v5.0 Administration Guide.

Setting	Where to change it
License Key	SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform. In the **Configuration** section, click **View/Edit License**.
Email List Website Location	SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform. In the **Email and Notifications** section, click **Configure Email Settings**. Then use the **Email Handler** section.
Enable Lookout	
Set Lookout as My Site Home Page	

Upgrading Video Stream

New versions of Video Stream can be used to upgrade components which were installed on a server. Running the installer will automatically upgrade those components using the same options of the original installation after clicking the "Upgrade" button.

Appendix A: Sitrion Social install settings you can change via SharePoint Central Administration

The following installation settings may be changed outside of the Sitrion Social setup wizard via SharePoint's Central Administration site.

Setting	Where to change it
License Key	SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform. In the **Configuration** section, click **View/Edit License**.
Email List Website Location	SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform. In the **Email and Notifications** section, click **Configure Email Settings**. Then use the **Email Handler** section.

Appendix B: Setting up your account with the SharePoint permissions that are needed to install Sitrion Social

This appendix covers how to grant the following rights in SharePoint 2010:

How to grant an account SharePoint 2010 Farm Administrator rights

How to make an account an administrator of the User Profile Service Application

How to grant an account full sharing access to the User Profile Service Application

How to grant an account SharePoint 2010 Farm Administrator rights

Action	Result
1. Open SharePoint Central Administration. 2. Under the **Security** area, click the **Manage the farm administrators group** link.	
The **People and Groups – Farm Administrators** page appears. 3. Open the **New** menu and select **Add Users**.	
A dialog window titled **Grant Permissions** displays. 4. Type the name of the account that you want to be a farm administrator, with domain name, in the box at the top of the dialog. 5. Click the "Check user" icon below the box to validate the username you typed. When you have it correct, click the **OK** button.	

How to make an account an administrator of the User Profile Service Application

Action	Result
1. Open SharePoint Central Administration. 2. Under the **Application Management** area, click the **Manage Service Applications** link.	
3. From the list that appears, select the service application of type **User Profile Service Application** (but do not click on the name itself, which navigates away to a different page). 4. In the menu area, click **Administrators**.	
A dialog window titled **Administrators for the User Profile Service Application** displays. 5. Type the name of the account that you want to be an administrator, with domain name, in the box at the top of the dialog. 6. Click the "Check user" icon below the box to validate the username you typed. When you have it correct, click the **Add** button. 7. Make sure this account is now selected in the middle box. 8. In the **Permissions ...** box at the bottom, check **Full Control**. 9. Click **OK** to close the dialog.	
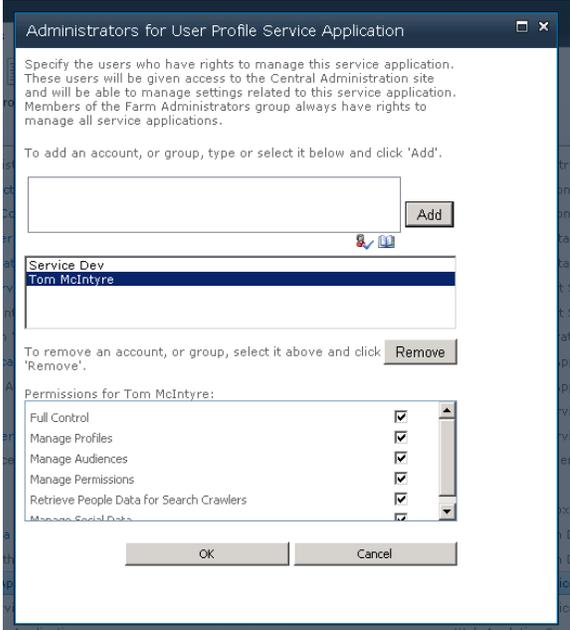
How to grant an account rights to invoke the User Profile Service Application

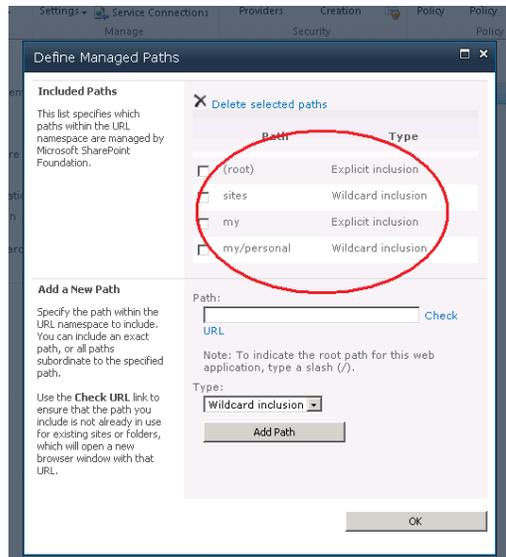| Action	Result
1. Open SharePoint Central Administration. 2. Under the Application Management area, click the **Manage Service Applications** link.	
3. From the list that appears, select the service application of type **User Profile Service Application** (but do not click on the name itself, which navigates away to a different page). 4. In the menu area, click **Permissions**.	
A dialog window titled **Connection Permissions for User Profile Service Application** *displays.* 5. Type the name of the account, with domain name, to which you want to grant connection/invoking permissions to the User Profile Service Application, in the box at the top of the dialog. 6. Click the "Check user" icon below the box to validate the username you typed. When you have it correct, click the **Add** button. 7. Make sure this account is now selected in the middle box. 8. In the **Permissions** ... box at the bottom, check **Full Control**. 9. Click **OK** to close the dialog.	
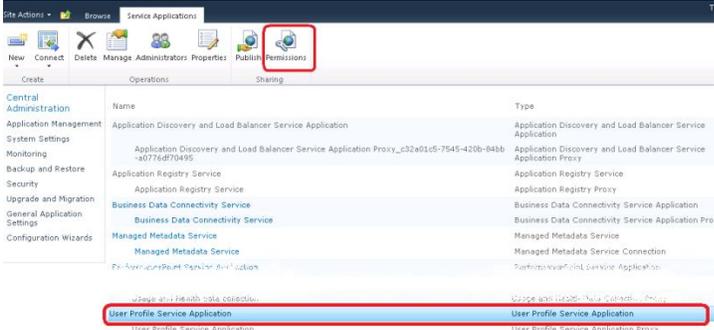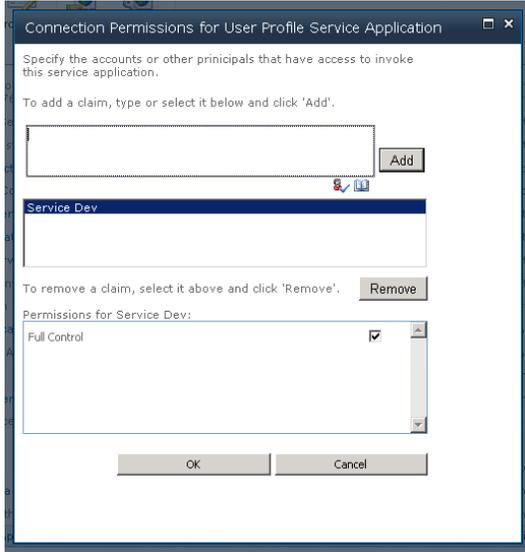
Appendix C: Granting Isolated App Pools Access to Each Other

For Sitrion Social versions 2.0 and later, it is no longer necessary to grant web applications that have Sitrion Social installed on them full access to the other web applications that have Sitrion Social, when using account pool isolation (different security accounts on all your web applications). This Appendix, instructing how to do this, has therefore been removed.

Appendix D: Creating a Sitrion Social Admin site

After completing installation of Sitrion Social, you will most likely want to create a Sitrion Social admin site to allow administrators access to globally-scoped reports, and broadcast message capability.

Action	Result
The first 5 steps are optional. Do only if you want to give your Admin site collection a particular path and you're not sure there's a managed path defined to support that path. 1. Open SharePoint Central Administration. 2. Under the Application Management area, click the **Manage Web Applications** link.	
3. From the list that appears, select the web application where you want the site to be located, then click **Managed Paths**.	
*A dialog window titled **Define Managed Paths** displays.* 4. Check the list of defined managed paths for the one you want your site collection at (Explicit Inclusion) or directly under (Wildcard Inclusion). If it doesn't exist, use the **Add a New Path** section to create it. 5. Click **OK** to close the dialog.	
6. Return to the main Central Administration page and click **Create site collections**.	
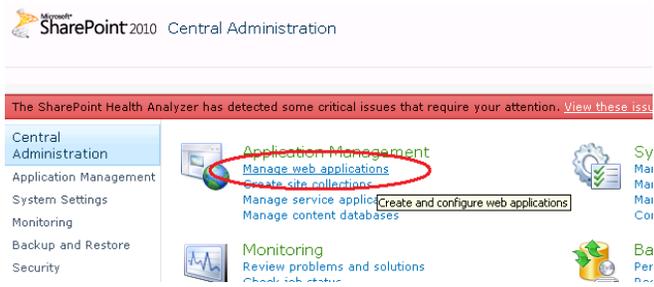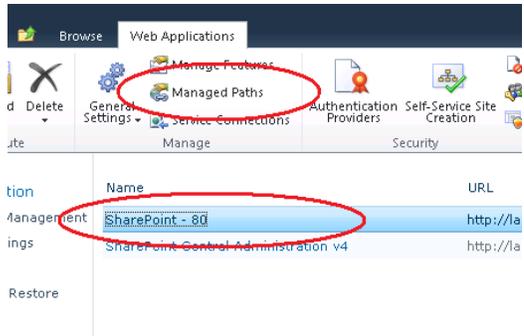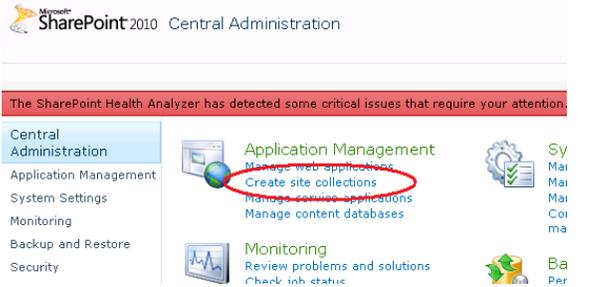
7. When filling out the **Create Site Collection** page, make sure you have specified your desired location by first selecting the desired web application at the top, and the desired path in the **Web Site Address** section.

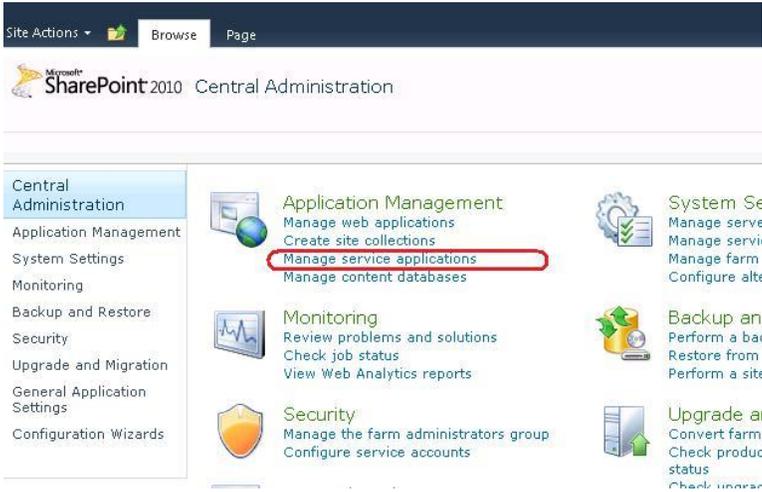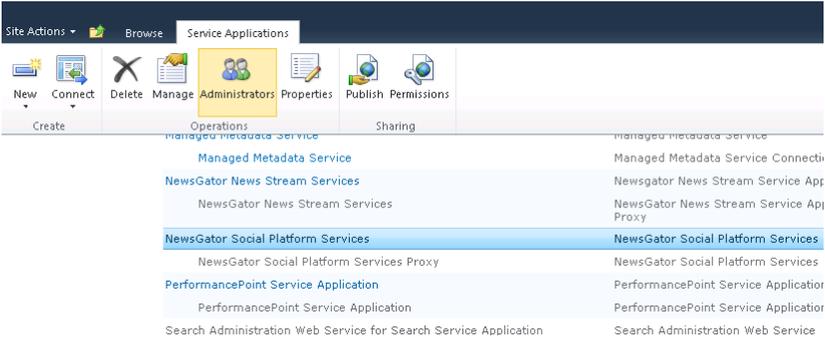8. In the Template Selection section, select the **NewsGator** tab, and within that, the **NewsGator Administration** template.

Appendix E: Adding Warnings from Sitrion Social to the Event Log

After completing your initial installation, by default Sitrion Social will log errors, but not warnings. NewsGator recommends you change this setting so that warnings are logged as well. To do so, follow the instructions below.

Action	Result
1. Open SharePoint Central Administration. 2. Go to the **Monitoring** section. 3. Under **Reporting**, click **Configure diagnostic logging.**	
4. In the **Event Throttling** section of the **Diagnostic Logging** page, check and expand **NewsGator Social Sites.** All items underneath should become checked as well.	
5. Below this, set **Least critical event to report to the event log** to **Warning**. 6. You may also want to adjust the setting **Least critical event to report to the trace log** if you'd prefer something different than the default. 7. Scroll to the bottom and click **OK**.	
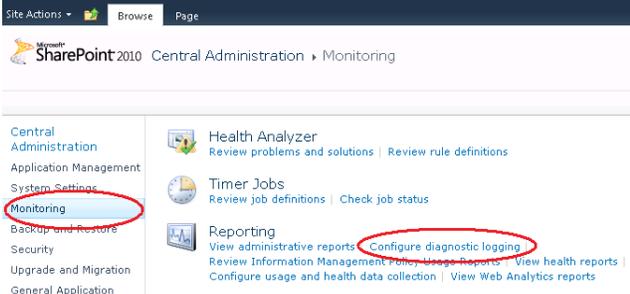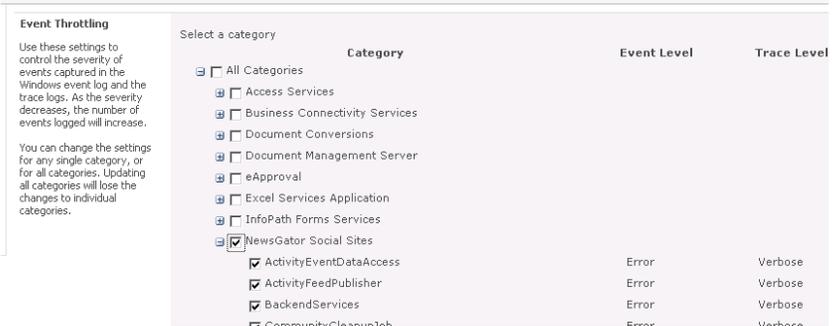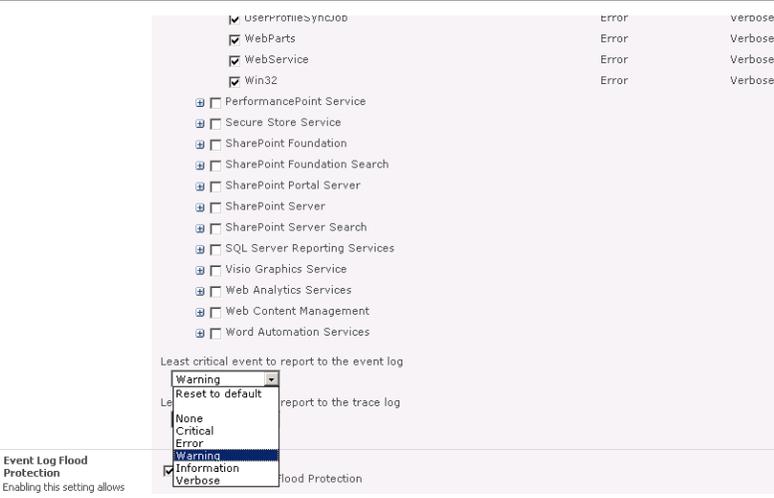
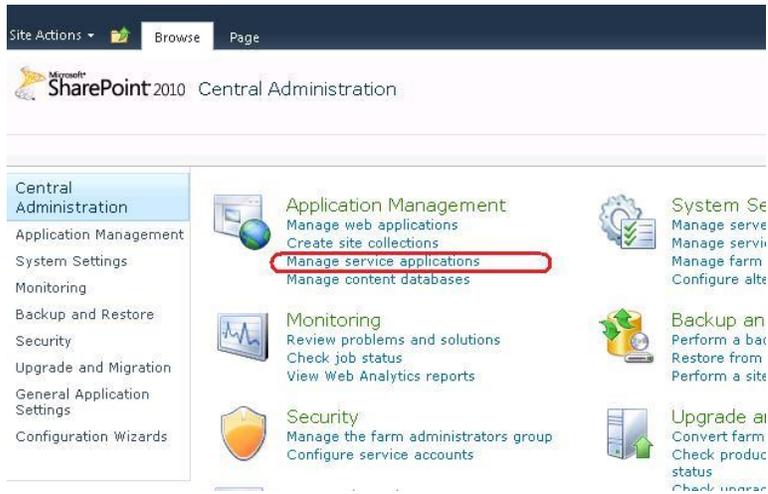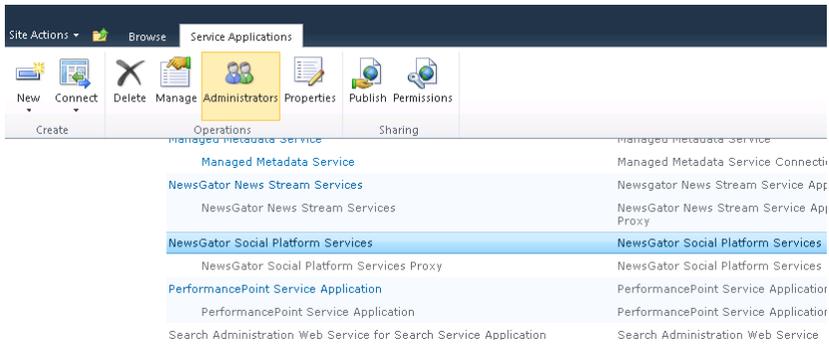# Appendix F: How to Grant Rights to Delete All Events

Action	Result
1. Open SharePoint Central Administration. 2. Under the **Application Management** area, click the **Manage Service Applications** link.	
3. From the list that appears, select **NewsGator Social Platform Services** (but do not click on the name itself, which navigates away to a different page). 4. In the menu area, click **Administrators**.	
A dialog window titled **Administrators for NewsGator Social Platform Services** displays. 5. Type the name of the account that you want to be an administrator, with domain name, in the box at the top of the dialog. 6. Click the "Check user" icon below the box to validate the username you typed. When you have it correct, click the **Add** button. 7. Make sure this account is now selected in the middle box. 8. In the **Permissions ...** box at the bottom, check **Delete Events** to allow the user to delete any activity stream event in the system. 9. Click **OK** to close the dialog.	
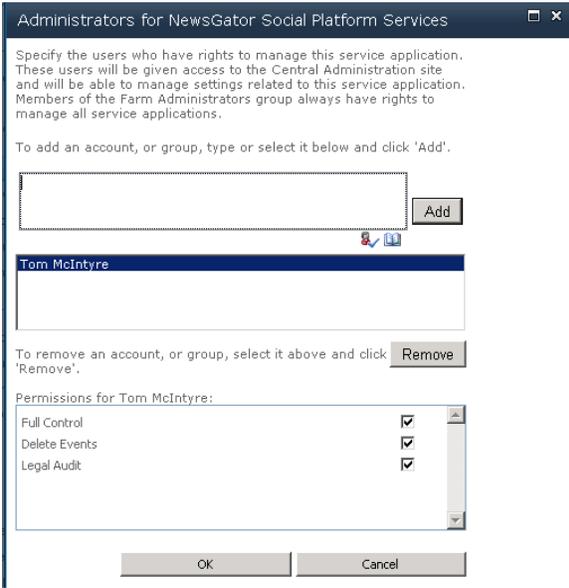
Appendix G: Connecting Child Farms to NewsGator Services on the Parent Farm

For Sitrion Social to work properly in a multi-farm environment, the child farms must connect to the parent farm's NewsGator Social Platform Service. The same is true of the managed service applications of some modules that may be included with your installation of Sitrion Social. Below are instructions for how to do this. They are described in two stages:

1. publishing the services from the parent farm
2. connecting to the services from each child farm

Publishing the services from the parent farm

Action	Result
1. Open SharePoint Central Administration on the parent farm. 2. Under the **Application Management** area, click the **Manage Service Applications** link.	
3. From the list that appears, select **NewsGator Social Platform Services** (or **NewsGator News Stream Services**, or other module's service; but do not click on the name itself, which navigates away to a different page). 4. In the menu area, click **Publish**.	

A dialog window titled **Publish Service Application** displays.

5. Check **Publish this Service Application to other farms**.

6. If not all the child farms have a trust relationship as yet with the parent farm, this will need to be set up. The link in the Trusted Farms section gives you the opportunity to do so now.

7. Copy and save the **Published URL** for use later in this process.

8. Click **OK** to close the dialog and publish the service.

Publish Service Application

Modify the settings that are used to connect to this Service Application and make this Service Application available outside this farm.   Help

Connection Type
Select the default connection type to use with this Service Application.

https

Publish to other farms
Publishing a service application makes it available for other farms in your network to discover and use.

☐ Publish this Service Application to other farms

Trusted Farms
You need to set up a trust relationship with another farm before it can use the services published from this farm.

Click here to add a trust relationship with another farm

Published URL
To add a connection to this Service Application in the remote farm, you should enter this URL in the 'Connect to a Remote Server Application' page.

urn:schemas-microsoft-com:sharepoint:service:64d5f889886e4168a3d3c02219a5b9d2#authority=urn:uuid:b856f16a4d9d47f19f0344d9d

Description Text
You can optionally provide

Description:

OK   Cancel

Connecting to the services from each child farm

Action	Result
1. Open SharePoint Central Administration on a child farm. 2. Under the **Application Management** area, click the **Manage Service Applications** link.	
3. Near the top of the page that appears, click **Connect**, then select the service you want to connect to (**NewsGator Social Platform Services, NewsGator News Stream Services**, **NewsGator Enrich Services**, or other module's service).	
4. A dialog, "Connect to a Remote Service Application" appears. Enter the Published URL of the service you're trying to connect to (which you copied in step 7 of **Publishing the services from the parent farm**, above). 5. Click **OK**.	
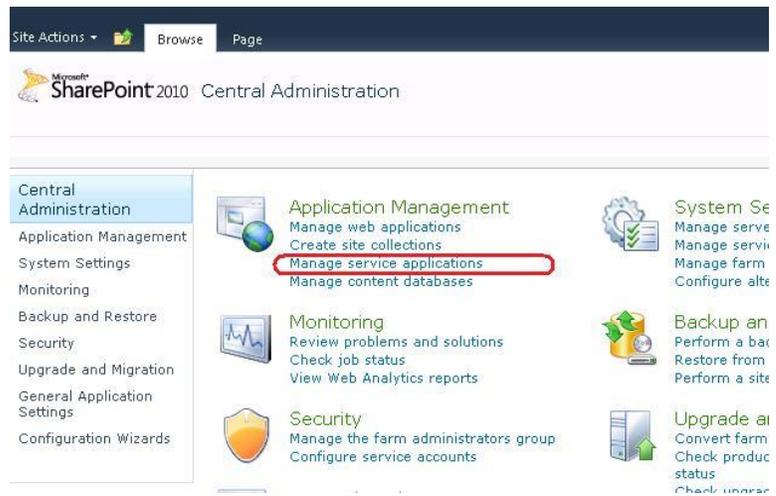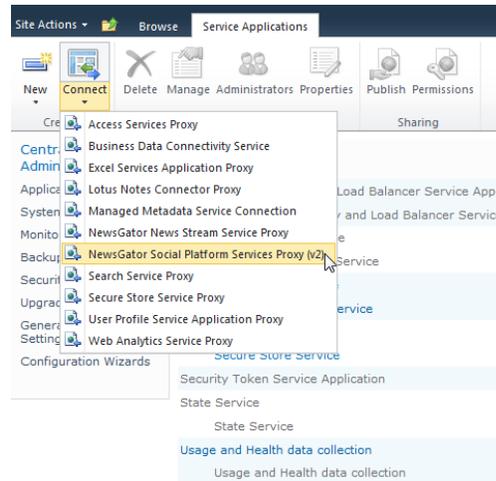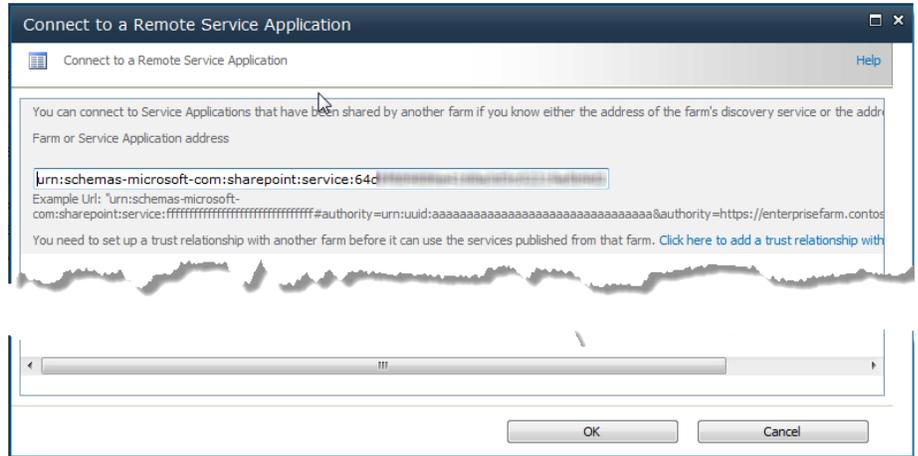
6. The dialog remains and now displays all service applications that are at the URL you specified. There should be only one item in the list. Select it. 7. Leave "Add this service application's proxy to the farm's default proxy list" checked. 8. Click **OK**.	
9. You may optionally rename the connection at this point. 10. Click **OK**.	
11. Repeat steps 3-9 for each service application you need to connect to from the parent farm. When completed, you'll see something like the following on the Manage Service Applications page:	
12. Repeat steps 1-11 for each child farm.	
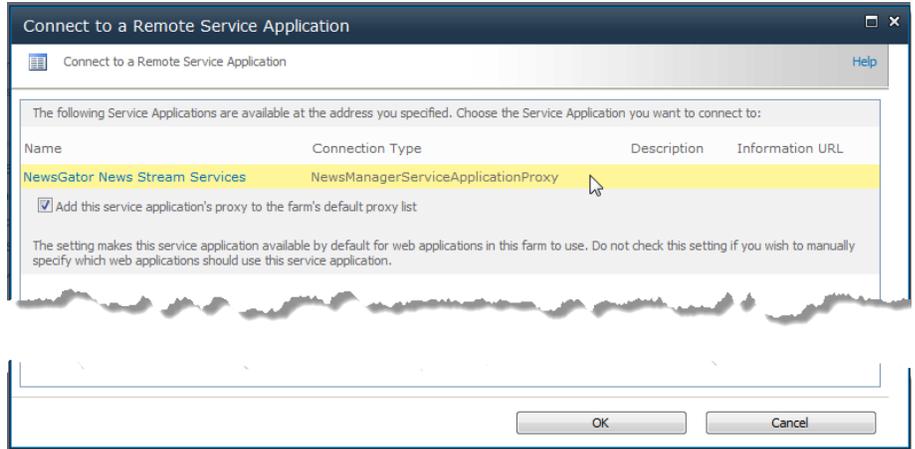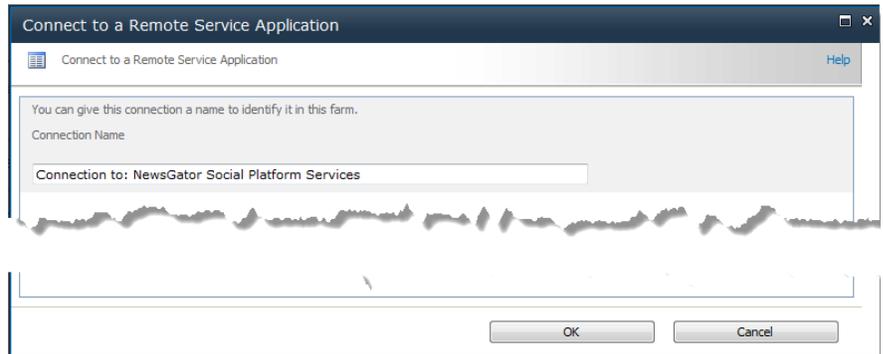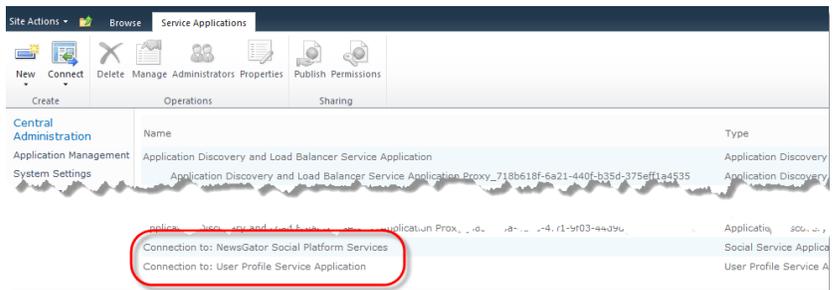
Appendix H: Compatibility with SharePoint Cumulative Updates

The follow chart lists which SharePoint 2010 Cumulative Updates (CU's) have been tested successfully with which releases of Sitrion Social, since the 2.0 release. That a CU does not appear on this list with a certain release should not be taken as an implication that they are incompatible. Most likely, that Sitrion Social release was just not tested with that CU.

Sitrion Social compatibility testing with SharePoint CU's

Release Date	Release build	Service Pack	CU release	CU version
Version 5.0				
October 9, 2014	5.0.7	2013 SP1r2	Service Pack 1 rel. 2	15.0.4569.1000
		2010 SP2	July 2014	14.0.7128.5000
Version 4.5				
August 21, 2014	4.5.211	2013 SP1r2	Service Pack 1 rel. 2	15.0.4569.1000
		2010 SP2	July 2014	14.0.7128.5000
		2010 SP2	December 2013	14.0.7113.5000
July 23, 2014	4.5.176	2013 SP1r2	Service Pack 1 rel. 2	15.0.4569.1000
		2010 SP2	December 2013	14.0.7113.5000
		2010 SP2	October 2013	14.0.7108.5000
June 10, 2014	4.5.128	2013 SP1r2	Service Pack 1 rel. 2	15.0.4569.1000
		2010 SP2	December 2013	14.0.7113.5000
		2010 SP2	October 2013	14.0.7108.5000
April 30, 2014	4.5.97	2013 RTM	October 2013	15.0.4551.1001
		2010 SP2	December 2013	14.0.7113.5000
		2010 SP2	October 2013	14.0.7108.5000
April 7, 2014	4.5.82	2013 RTM	October 2013	15.0.4551.1001
		2010 SP2	December 2013	14.0.7113.5000
		2010 SP2	October 2013	14.0.7108.5000
February 25, 2014	4.5.21	2013 RTM	October 2013	15.0.4551.1001
		2010 SP2	December 2013	14.0.7113.5000
		2010 SP2	October 2013	14.0.7108.5000
		2010 SP1	April 2013	14.0.6137.5000
Version 4.1				
December 5, 2013	4.1.106x	2013 RTM	February 2013	15.0.4420.1017
		2010 SP2	October 2013	14.0.7108.5000
		2010 SP2	August 2013	14.0.7106.5002
November 12, 2013	4.1.1034	2013 RTM	February 2013	15.0.4420.1017
		2010 SP2	October 2013	14.0.7108.5000
		2010 SP2	August 2013	14.0.7106.5002

October 18, 2013	4.1.967	2013 RTM	February 2013	15.0.4420.1017
		2010 SP2	August 2013	14.0.7106.5002
Version 4.0				
November 18, 2013	4.0.266	2013 RTM	February 2013	15.0.4420.1017
		2010 SP2	October 2013	14.0.7108.5000
June 18, 2013	4.0.143	2013 RTM	February 2013	15.0.4420.1017
		2010 SP1	April 2013	14.0.6137.5000
		2010 SP1	December 2012	14.0.6131.5003
		2010 SP1	June 2011 refresh	14.0.6106.5002
May 31, 2013	4.0.101	2013 RTM	February 2013	15.0.4420.1017
		2010 SP1	December 2012	14.0.6131.5003
		2010 SP1	June 2011 refresh	14.0.6106.5002
Version 3.5				
May 1, 2013	3.5.2277	SP1	February 2013	14.0.6134.5000
		SP1	December 2012	14.0.6131.5003
		SP1	June 2011 refresh	14.0.6106.5002
April 3, 2013	3.5.2252	SP1	February 2013	14.0.6134.5000
		SP1	December 2012	14.0.6131.5003
		SP1	June 2011 refresh	14.0.6106.5002
March 4, 2013	3.5.2237	SP1	February 2013	14.0.6134.5000
		SP1	December 2012	14.0.6131.5003
		SP1	June 2011 refresh	14.0.6106.5002
Febuary 22, 2013	3.5.2227	SP1	February 2013	14.0.6134.5000
		SP1	December 2012	14.0.6131.5003
		SP1	August 2012	14.0.6126.5000
		SP1	June 2011 refresh	14.0.6106.5002
January 31, 2013	3.5.2130	SP1	December 2012	14.0.6131.5003
		SP1	August 2012	14.0.6126.5000
		SP1	June 2011 refresh	14.0.6106.5002
Version 3.1				
October 26, 2012	3.1.1032	SP1	August 2012	14.0.6126.5000
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
Version 3.0				
August 10, 2012	3.0.101	SP1	June 2012	14.0.6123.5002
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
Version 2.6				
July 23, 2012	2.6.685	SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002

May 15, 2012	2.6.615	SP1	February 2012	14.0.6117.5002
		SP1	August 2011	14.0.6109.5002
April 27, 2012	2.6.589	SP1	February 2012	14.0.6117.5002
		SP1	December 2011	14.0.6114.5000
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
March 28, 2012	2.6.526	SP1	February 2012	14.0.6117.5002
		SP1	December 2011	14.0.6114.5000
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
March 12, 2012	2.6.485	SP1	February 2012	14.0.6117.5002
		SP1	December 2011	14.0.6114.5000
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000
Version 2.5				
January 31, 2012	2.5.1059	SP1	December 2011	14.0.6114.5000
		SP1	August 2011	14.0.6109.5002
		SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000
Version 2.1				
November 29, 2011	2.1.1188	SP1	August 2011	14.0.6109.5002
		SP1	--	14.0.6029.1000
October 18, 2011	2.1.1120	SP1	August 2011	14.0.6109.5002
		SP1	--	14.0.6029.1000
October 17, 2011	2.1.1115	SP1	August 2011	14.0.6109.5002
		SP1	--	14.0.6029.1000
October 7, 2011	2.1.1084	SP1	August 2011	14.0.6109.5002
		SP1	--	14.0.6029.1000
Version 2.0				
November 11, 2011	2.0.1687	SP1	August 2011	14.0.6109.5002
		SP1	--	14.0.6029.1000
August 25, 2011	2.0.1542	SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000
August 8, 2011	2.0.1483	SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000
July 18, 2011	2.0.1436	SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000
June 30, 2011	2.0.1377	SP1	June 2011 refresh	14.0.6106.5002
		SP1	--	14.0.6029.1000

Appendix J: Using Powershell to perform a scripted install of Sitrion Social on SharePoint 2010 SP1 or SharePoint 2013

These instructions are used for installations of either SharePoint 2010 SP1 or SharePoint 2013.

Before you begin

Before performing a scripted install of Sitrion Social as outlined in this appendix, read and follow all sections of this document before the section titled **Proceeding with Sitrion Social Install/Upgrade/Repair**. Once these Appendix H instructions are completed, you may find helpful suggestions in the subsection of the **Proceeding with Sitrion Social Install/Upgrade/Repair** section, above, titled **If something goes wrong during install.** Then proceed to the **Next Steps** section to check for other steps you'll want to perform.

Installing

Sitrion Social comes with a PowerShell-based installer that can be used to perform scripted installs to SharePoint 2010 SP1 or to SharePoint 2013. It can be found in the **Scripts** folder of the installation package. To launch PowerShell with both the SharePoint SnapIns and the Sitrion Social Cmdlets loaded, run the **Sitrion Social Management Shell** link from the Scripts folder.

From that command prompt, the following commands are available:

Install-SocialSites

For a new install, you will first need to create the Service Application Pool in SharePoint for Sitrion Social. If installing News Manager, a second one will be needed for it.

Example:

New-SPServiceApplicationPool "NewsGator_PlatformServices"

New-SPServiceApplicationPool "NewsGator_NewsManager"

(Each will ask for the service account to run under.)

Once the service applications are created, they need to be assigned to variables:

Example:

$appPool = Get-SPServiceApplicationPool "NewsGator_PlatformServices"

$nmAppPool = Get-SPServiceApplicationPool "NewsGator_NewsManager"

Now the Install-SocialSites cmdlet can be run.

Example:

Install-SocialSites -LiteralPath $pwd -DatabaseServer "SERVERNAME (NOT LOCALHOST)" -DatabaseName "NewsGator_SocialServices" -ReportDatabaseName "NewsGator_Reporting" -EmailListWebUrl "http://SERVERNAME" -MySiteWebUrl "http://SERVERNAME/my" -AllWebApplications -LicenseKey "Your Key Here" -ReplaceMySiteWebParts -

ApplicationPool $appPool -NewsManagerDatabaseName "NewsGator_NewsManager" -NewsManagerApplicationPool $nmAppPool -Verbose

Details:

-LiteralPath: path to the solutions folder, if currently in the solutions folder $pwd can be used

-DatabaseServer: where to put the NewsGator databases, cannot be LOCALHOST or . (dot), you need to specify the machine name

-DatabaseName: name of the platform services database

-ReportingDatabaseName: name of the reporting database

-EmailListWebUrl: url of the SharePoint site to put the email lists

-MySiteWebUrl: url of the My Site

-AllWebApplications {OR} -WebApplications "url 1", "url 2": specify which content web applications to deploy NewsGator to

-LicenseKey: the license key provided by NG

-ReplaceMySiteWebParts: without this flag, the My Site would stay as default OOTB SharePoint, with it the web parts are replaced with the NewsGator web parts

-ApplicationPool: the SharePoint Service Application Pool for the platform services

-NewsManagerDatabaseName: name of the news manager database

-NewsManagerApplicationPool: the SharePoint Service Application pool for the news manager

-Verbose: enabled more details output to the console (use for logging or if having issues to help identify where the issue occurs)

Video-Stream-Specific Options:

-VideoApplicationPool: the SharePoint Service Application pool for video stream.

-VideoEncodingInputFolder: The path to the encoding input folder (aka to be encoded folder). UNC paths are allowed.

-VideoEncodingOutputFolder: The path to the encoding output folder (aka encoded folder). UNC paths are allowed.

-VideoStreamingServerFolder: The physical path to the streaming folder on the streaming server. UNC paths are allowed.

-VideoUploadFolder: The physical path to the upload folder on the WFE. UNC paths are allowed.

-VideoStreamingServerUrlDefaultZone: The URL for the default zone to the streaming server's streaming content on the streaming server.

-VideoStreamingServerUrlIntranetZone: The URL for the Intranet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

-VideoStreamingServerUrlInternetZone: The URL for the Internet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

-VideoStreamingServerUrlCustomZone: The URL for the Custom zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

-VideoStreamingServerUrlExtranetZone: The URL for the Extranet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

Enrich-Specific Options:

-LearningApplicationPool: the SharePoint Service Application pool for Enrich.

-LearningGlobalKnowledgeBase: The URL to the Global Knowledge Base

Manual steps

Enable site collection features before enabling web features:

- NewsGator Common Libraries feature (Site)
- NewsGator Knowledge Base (Site)
- NewsGator Knowledge Base Fields for SharePoint 2013 (Site)
- NewsGator Video Scenarios (Site)
- NewsGator Video Scenarios Fields for SharePoint 2013 (Site)
- NewsGator VideoStream Fields for SharePoint 2013 (Site)
- NewsGator VideoStream UI (Site)

Update-SocialSites

To update an existing install, simply run

> Update-SocialSites -LiteralPath $pwd -Verbose

Uninstall-SocialSites

To remove Sitrion Social (might need to use if the install failed and need to retry):

> Uninstall-SocialSites -RemoveSocialSites -Verbose

Appendix K: Managing Your Sitrion Social Installation with PowerShell

Windows PowerShell is a command-line scripting shell that provides administrators the ability to perform administrative operations using specialized commands called Cmdlets. The Cmdlets provided by the Microsoft SharePoint Management Shell is the preferred, and sometimes the only, method for performing certain administrative tasks for SharePoint.

Installation and configuration of Sitrion Social may also be accomplished with PowerShell Cmdlets in the Sitrion Social Management Shell. The following Cmdlets are available in the management shell. For more details about each Cmdlet and their usage, use the *Get-Help* Cmdlet in the management shell.

- *Install-SocialSites*: Perform a new installation of Sitrion Social.
- *Update-SocialSites*: Perform an upgrade of an existing installation of Sitrion Social.
- *Uninstall-SocialSites*: Perform an uninstall of an existing installation of Sitrion Social.
- *Get-SocialSitesActivityTypes*: Get a list of SharePoint Activity Types installed to the SharePoint farm.
- *Disable-SocialSitesFeatures*: Disable Sitrion Social SharePoint features.
- *Update-SocialSitesFeatures*: Ensure each Sitrion Social SharePoint feature activated is up-to-date with the currently installed feature definition.
- *Initialize-SocialSitesFeatures*: Re-activate the Sitrion Social SharePoint farm features for the Video, Enrich, and Innovation modules.
- *Remove-SocialSitesOrphanedFeatures*: Remove old features from previous versions of Sitrion Social (formerly called "Social Sites"), primarily for the Video module.
- *Disable-SocialSitesJobs*: Disable all Sitrion Social timer jobs.
- *Enable-SocialSitesJobs*: Enable all disabled Sitrion Social timer jobs.
- *Start-SocialSitesAdminJobs*: Manually execute the SharePoint Administration jobs.
- *Restart-SocialSitesTimerService*: Execute the SharePoint Timer Service recycle job.
- *Disable-SocialSitesUserProfileJob*: Disable the SharePoint user profile synchronization job.
- *Enable-SocialSitesUserProfileJob*: Enable the SharePoint user profile synchronization job.
- *Get-SocialSitesModules*: Get a list of Sitrion Social modules currently installed.
- *Install-SocialSitesModules*: Install a Sitrion Social module without running a full install of Sitrion Social.
- *Remove-SocialSitesModules*: Remove a Sitrion Social module without running a full uninstall of Sitrion Social.

- *Update-SocialSitesModules*: Update a Sitrion Social module without running a full update of Sitrion Social.
- *Export-SocialSitesConfiguration*: Export detailed information about the SharePoint and Sitrion Social instances.
- *Get-SocialSitesConfiguration*: Get detailed information about the SharePoint and Sitrion Social instances.
- *New-SocialSitesServiceApplication*: Provision a new Sitrion Social service application.
- *Remove-SocialSitesServiceApplication*: Remove an existing Sitrion Social service application.
- *Update-SocialSitesServiceApplication*: Update an existing Sitrion Social service application.
- *Set-SocialSitesCaching*: Configure caching in Sitrion Social.
- *Enable-SocialSitesDebugger*: Enable the Just-In-Time debugger on the local machine if previously disabled with the *Disable-SocialSitesDebugger* Cmdlet.
- *Disable-SocialSitesDebugger*: Disables the Just-In-Time debugger on the local machine.
- *Enable-SocialSitesMySiteLookout*: Enable Lookout on the My Site host.
- *Set-SocialSitesMySiteLookoutHomePage*: Set Lookout as the home page of the My Site host.
- *Set-SocialSitesMySiteNewsFeedWebParts*: Replace the web parts on the My Site Newsfeed page with Sitrion Social web parts.
- *Enable-SocialSitesMySiteWebParts*: Enable the Sitrion Social web parts feature on the My Site host.
- *Update-SocialSitesNotificationProviders*: Update the Sitrion Social notification providers.
- *Restart-SocialSitesServices*: Restart SharePoint and IIS services on each server in the farm.
- *Add-SocialSitesSolution*: Add an individual Sitrion Social solution to the farm.
- *Install-SocialSitesSolution*: Deploy an individual Sitrion Social solution to the farm.
- *Remove-SocialSitesSolution*: Retract and remove an individual Sitrion Social solution from the farm.
- *Update-SocialSitesSolution*: Update an individual Sitrion Social solution on the farm.
- *Add-SocialSitesSolutions*: Add the available Sitrion Social solutions to the farm.
- *Install-SocialSitesSolutions*: Deploy the available Sitrion Social solutions to the farm.
- *Remove-SocialSitesSolutions*: Retract and remove the Sitrion Social solutions from the farm.
- *Update-SocialSitesSolutions*: Update the Sitrion Social solutions on the farm.
- *Start-SocialSitesWebApplicationPools*: Ensure the IIS web application pools are started for the SharePoint web applications.
- *Copy-SocialSitesWebAplicationsBinContent*: Copy the application bin content to the web applications on each SharePoint server.
- *Disable-SocialSitesWebApplications*: Disable end-user access to the SharePoint web applications.

- *Enable-SocialSitesWebApplications*: Enable end-user access to the SharePoint web applications.
- *Get-SocialSitesAssemblies*: Get a list of Sitrion Social assemblies in the Global Assembly Cache on the local machine.
- *Repair-SocialSitesAssemblies*: Attempt to add the assemblies from each SharePoint solution in the current directory to the Global Assembly Cache

Appendix L: Configuring the Video Stream Encoder

This section provides more details on the encoders supported by Video Stream as described above. It also explains how to configure to support various scenarios.

Supported encoders

Encoder	Target Codec
Microsoft Expression Encoder 4.0 Free edition	VC1 Progressive Downlaod (non-Smooth Streaming)
	VC1 Smooth Stream

FFMPEG with xlib264 and qt-faststart.exe	H264 progressive download

By default, Video Stream uses Smooth Stream encoding for web playback (i.e. browser) and progressive H264 encoding for mobile viewing.

Microsoft Expression Encoder 4.0 Free Edition

As described in the *Software Prerequisites for the Encoding Service* above, if you wish to do Smooth Streaming or use VC1 as a target codec you will need this encoder. You can get it from: http://www.microsoft.com/en-us/download/details.aspx?id=27870.   This encoder is also the default for encoding the thumbnail. Using the FFMPEG encoder for producing the thumbnail is described below.

Customizing the Smooth Stream transcoding

Starting with 2.6.3, it is possible to specify a customized preset file to use when Microsoft Expression Encoder transcodes a video.   For example, you would use a custom preset file if you want to change how many stream gets generated when transcoding to the smooth stream format.

Here are the steps you need to take:

1. Create a preset file using the Microsoft Expression Encoder client application.
2. Place the preset file in the root folder of the Video Stream encoding service.
3. Open the encoding service configuration file. It will be located at the root folder of the Video Stream encoding service.
4. Find the entries that have the following format:
   `<add key="NG.MSExpression.SmoothStreamVC1.{height}.Preset" value=""/>`
   There will be an entry for videos that have a height of 1800 or more, 720 to 1079 and one for videos that are less than 720.
5. Add the name of you customized preset file in between the "". Such as
   `<add key="NG.MSExpression.SmoothStreamVC1.1080.Preset" value="MyPresets.xml"/>`
   `<add key="NG.MSExpression.SmoothStreamVC1.720.Preset" value="MyPresets.xml"/>`
   `<add key="NG.MSExpression.SmoothStreamVC1.480.Preset" value="MyPresets.xml"/>`
6. Add a video and it will use the preset file while encoding.

For more information on how to create a preset file from within the Microsoft Expression Encoder:
http://msdn.microsoft.com/en-us/library/cc294566(v=expression.40).aspx

FFMPEG

As described in the *Software Prerequisites for the Encoding Service* above, if you wish to encode to a portable format that is viewable across a wide range of mobile devices you will need to transcode your videos to a H264 codec. We support this scenario through the use of a widely used command line encoder called FFMPEG (in conjunction with the QT-FastStart).

FFMPEG comes in many flavors; the one we tested against is compiled with an x264 library in it to enable H264 transcoding. You can get it from:

32 Bit

http://ffmpeg.zeranoe.com/builds/win32/static/ffmpeg-20121125-git-26c531c-win32-static.7z

64 Bit

http://ffmpeg.zeranoe.com/builds/win64/static/ffmpeg-20121125-git-26c531c-win64-static.7z

QT-FastStart.exe

Another tool that we use is called qt-faststart.exe. This tool makes it so a video can be downloaded using the progressive download technique. You can read about this tool here: You can download the version we use from:

32 Bit
http://ffmpeg.zeranoe.com/builds/qt-faststart/win32/qt-faststart-git-91a4abd8-win32.7z
64 Bit
http://ffmpeg.zeranoe.com/builds/qt-faststart/win64/qt-faststart-git-91a4abd8-win64.7z

How to install FFMPEG and QT-FastStart.exe

1. Download both tools from either the 32 or 64 bit version. They are compressed with the 7zip utility you can find at http://www.7-zip.org/.
2. Extract the content of the FFMPEG file.
3. Copy the ffmpeg.exe from the **bin** folder to the root folder of the Video Stream encoding service
4. Copy the content of the **presets** folder to a new folder named **ffpresets** at the root folder of the Video Stream encoding service folder
5. Extract the content of the QT-FastStart file.
6. Copy qt-faststart.exe to the root folder of the Video Stream encoding service

Note: Unless changed during the installation of the Video Stream additional components, the encoding service should be located at "C:\Program Files (x86)\NewsGator\Video Stream Encoding Service"

Other encoding configuration options and the command line encoder

As of Video Stream 2.6.3, a command line encoder can be used for video transcoding.   Our use of FFMPEG/QT-FastStart is a kind of reference implementation although we don't actually reference FFMPEG or any other command line tools in our code base.   Instead, we call script files that execute the command line encoder. Those files can be found in the root folder of the Video Stream encoding service. They are:

1. **NG.CommandLine.GenerateThumbnail.txt:**
   This file holds commands to get FFMPEG to generate the thumbnail image for the video.
2. **NG.CommandLine.GetVideoInformation.txt:**
   This file holds commands to call the MediaInfo tool to read duration, bit rate, width and height information from the video file to transcode.
3. **NG.CommandLine.PreProcessFile.txt:**
   This file holds commands that will use FFMPEG to rotate the video back to a vertical position. This will only work if the source video has rotation metadata in it that can be used to figure out if and how much the video must be rotated.
4. **NG.CommandLine.ProgressiveH264.txt:**
   This file holds commands to transcode the video into an H264 format optimized for viewing in from a video player on a desktop. It also ensures the video can be truly used for progressive download by passing the resulting transcoded video to qt-faststart.exe.
5. **NG.CommandLine.ProgressiveMobileH264.txt:**
   This file holds commands to transcode the video into an H264 format optimized for viewing in from a video player on a mobile device. It also ensures the video can be truly used for progressive download by passing the resulting transcoded video to qt-faststart.exe.

Changing encoding settings in the command line encoder

Since all command line encodings are stored in script files it is possible for users to change settings used by the command line encoder. If you wish to change the commands that are sent to the command line encoder, make a copy of the default script file we provide and change the settings in that new file.   After that, specify the new script file in the encoding service configuration file. If you wish to revert back to the default script, make the setting null and the service will use the script we install by default.

List of available command line encoder scripts

Setting in the config file	Default file used if none specified in the setting. File is	Description

	located in the root folder of the encoding service.	
NG.CommandLineEncoder.GenerateThumbnail.Script	NG.CommandLine.GenerateThumbnail.txt	Runs command to generate the thumbnail that will be used to represent the video.
NG.CommandLineEncoder.PreProcess.Script	NG.CommandLine.PreProcessFile.txt	Runs commands before the video is transcoded. The commands we ship with will look to see if the video was rotated and rotates it back.
NG.CommandLineEncoder.ProgressiveH264.Script	NG.CommandLine.ProgressiveH264.txt	Runs commands to encode to H264 progressive download optimized for viewing in the web player.
NG.CommandLineEncoder.ProgressiveMobileH264.Script	NG.CommandLine.ProgressiveMobileH264.txt	Runs commands to encode to H264 progressive download optimized for viewing on mobile devices.
NG.CommandLineEncoder.ProgressiveVC1.Script	NG.CommandLine.ProgressiveVC1.txt	Runs commands to encode to VC1 progressive download optimized for viewing in the web player.
NG.CommandLineEncoder.KontikiH264.Script	NG.CommandLine.ProgressiveH264.txt	Runs commands to encode to H264 progressive download for use with the Kontiki platform.

Generating Thumbnails

Starting with version 2.6.3 of Video Stream you gain a lot more control over thumbnail image generation. You now have 2 options for thumbnail generation.

Using Microsoft Expression Encoder

Before Video Stream 2.6.3 this was the only option. This remains the default option.

Using FFMPEG Command Line Encoder

As of 2.6.3, you can use a command line encoder to generate a thumbnail for the video.

How to switch between the different thumbnail generators

In the config file of the encoding service you will find the following entry :
```
<add key="NG.ThumbnailGenerator" value=""/>
```
When the value of this entry is null, the encoding service will use Microsoft Expression Encoder to generate the thumbnail for the video.   To use a command line encoder script to generate the thumbnail specify the following:
```
<add key="NG.ThumbnailGenerator" value="NG.CommandLine.ThumbnailGenerator"/>
```

When using the command line thumbnail generator you can also specify via the configuration file at what position in the video you should take the thumbnail. By default, the thumbnail is taken 5 seconds into the video. For example to get a thumbnail at 7 seconds into a video you would do the following:
```
<add key="NG.CommandLineEncoder.GenerateThumbnail.Position" value="7"/>
```

Using Progressive Download instead of Smooth Streaming

Starting with 2.6.3 it is possible to use progressive download instead of Smooth Streaming for video encoding and playback.

Turning on progressive download

To switch over to progressive download you will have to do the following
1. Download the files required to use FFMPEG and QT-FastStart.exe
2. Go to the Video Stream properties page
    a. Set streaming option to "Progressive Download".
    b. All of your existing videos will get re-encoded to the H264 progressive download format.
        i. Since FFMPEG and QT-FastStart are used to encode to the H264 progressive download format, ensure those tools are installed before switching to progressive download.

WARNING: If you already have videos encoded in the Smooth Streaming format, they will be unavailable until they are all re-encoded to the H264 progressive download format.

Appendix M - Video Stream SharePoint Features

Farm Level

Dependency Registration Farm Features

These features are needed by all parts of VideoStream. These should also be the first features enabled. When activating or deactivating these features you should ALWAYS do an iisreset and a SharePoint timer restart on all machines in the Farm.

- NewsGator Common Librairies Dependency Registration (Farm)
    o Feature ID: 9860e8e6-ca0a-46db-81bc-fde72cfddca8
- NewsGator VideoStream Dependencies Registration (Farm)
    o Feature ID: 84e3b61d-c2c7-43ac-b7fc-4c90abf99593

Installer Farm Feature

This feature is needed to support most of VideoStream's infracture at the farm level. It registers the VideoStream service application definitions (this allows VideoStream service apps to be created).

- NewsGator VideoStream Module Installer (Farm)
    o Feature ID: a505e6bd-73d6-4da8-9afe-beae73e44184

Activity Feed Integration Farm Feature

The feature is needed in order to play videos (including videos from thirdparty services likes YouTube) in the activity stream.

- NewsGator VideoStream to Activity Feed integration (Farm)
    o Feature ID: 07bf848d-9196-4796-87de-262f473eae3c

Site Collection Level (SPSite)

VideoStream Fields

Adds fields/columns used by all VideoStream sites in the site collection

- NewsGator VideoStream Fields (Site)
    o Feature ID: fa10c93d-3032-4dcc-b1ac-07445c6bbca2

VideoStream UI

Adds web parts used by all VideoStream sites in the site collection

- NewsGator VideoStream UI (Site)
  - Feature ID: 282d2872-398a-4652-800f-c7a2069b0964

Site Level (SPWeb)

VideoStream UI

This adds the Video tab, Video Center home page, Video page and the VideoStream asset library to the site. In other words adds video stream support to the community.

- NewsGator VideoStream UI (Web)
  - Feature UI: 5e530211-11cc-4d7f-8c57-7c763f0b2585

Appendix N - Performance Testing and Sizing of Video Stream

The Video Stream module for Sitrion Social provides the ability to upload large videos, discover the most popular ones and view them inline in the activity stream.   Most of the common input video codecs are supported and are encoded to provide an HD viewing experience up to 1080p (depending on quality of video uploaded).   Using Microsoft's Smooth Streaming technology, the individual user's video playing experience is optimized for the current network bandwidth and client performance. Video Stream is an optional module which integrates tightly with, and requires the functionality of, the base Sitrion Social product.

Target Audience

These performance notes are intended for customers who have special performance requirements.

Objective

The goal of this performance testing to characterize the performance of Video Stream in 4 key areas:

- Uploading videos
- Encoding videos
- Browsing most liked, most watched and recent videos
- Viewing videos

Test Environment (Hardware)

Server A– SharePoint server, Streaming server and Web Front End

- Dell PowerEdge 2900
- MS Windows Server 2008 R2, Standard Edition
- Microsoft SharePoint 2010
- Processors: Quad Core Intel® Xeon® E5450, 2x6MB Cache, 3.0GHz, 1333MHz FSB
- Memory: 4 GB 667 MHz Dual Ranked DIMMs
- 6 Hard Drives:

  - 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 1 array (OS drive)
  - 4 x 146 GB 15K RPM Serial-Attach SCSI RAID 5 array (where applicable)

Server B – Database Server

- Dell PowerEdge 2900
- MS Windows Server 2008 R2 , Enterprise x64 Edition
- Processors: 2 x Quad Core Intel® Xeon® X5450, 2x6MB Cache, 3.0GHz, 1333MHz FSB
- Memory: 8 GB 667 MHz Dual Ranked DIMMs
- MS SQL Server 2008 R2
- 8 Hard Drives:

  - 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 1 array (OS drive)
  - 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 0 array (Log files)
  - 4 x 146 GB 15K RPM Serial-Attach SCSI RAID 5 array (databases)

Server C – Encoding Server

- VM running with 8 GB, 4 Cores
- MS Windows Server 2008 R2, Enterprise x64 Edition
- .NET Framework 4.0

Clients

- Windows 7
- JMeter
- IE 8

Network

- 1 GBit between servers, 100 MBit or 1 GBit from client to server depending on test

Software

- Social Sites 2.0 with Video Stream 2.0

Deployment

Server A – SharePoint server, Streaming server and Web Front End

- Windows 2008 R2 x64
- SharePoint Server 2010
- Social Sites 2010 2.0
- Social Sites Video Stream 2.0
- IIS 7.5 with Smooth Streaming Media Extensions

Server B – Database Server

- Windows 2008 R2 x64
- SQL Server 2008 R2

Server C – Encoding Server

- Windows 2008 R2 x64
- Microsoft Expression Encoder Pro

Client

- Windows 7

Test Methodology

The objective of this document is to show the performance of Video Stream for 10,000 and 50,000 community members.   Since only a very small subset of users are actually active in the system (and less so for communities versus regular team sites), we are using a concurrency ratio of 1 to 100 for video viewing and browsing (i.e. 100 simultaneously users viewing and browsing represents a community of 10,000 members).   Uploading and encoding will be much less at 1 to 500. The concurrency ratio for any given installation may be higher or lower.

We used Apache JMeter to monitor test cases for performance results. All tests were run independently. The test cases include:

- Video viewing test for 10,000 Members with high-quality video
- Video viewing test for 50,000 Members with medium-quality video
- Video Center browsing for 10,000 members
- Encoding performance for 50,000 members
- Video upload performance for 50,000 members

Test Results

1. Video viewing test for 10,000 Members with high-quality video
    a. Test data
        i. 100 simultaneous users watching 10 minute 1080p videos
    b. System statistics (Server A with 100MBit network)
        i. CPU: 34%
        ii. Network: < 15%
        iii. Disk: Busy, Utilization 178 read/writes per second ,
        iv. Memory: Normal, 52%, Top Process: w3wp (450,636KB)
    c. Requests:
        i. GetSecurityToken: Average - 719ms, Median 716ms
        ii. OpenSession: Average - 521 ms, Median 551ms
        iii. GetChunk: Average 5560ms, Median 4500ms
    d. Comments
        i. No obvious bottle-necks for this number of users.
2. Video viewing test for 50,000 Members with medium-quality video
    a. Test data
        i. 500 simultaneous users watching 10 minute video at 1.15 Mb/s (good quality at default player size and decent quality at full screen)
    b. System statistics (Server A with 1GB network)
        i. CPU: 11%
        ii. Network: 97%
        iii. Disk: Busy, Utilization 7 read/writes per second ,
        iv. Memory: Normal, 50%, Top Process: w3wp (450,636KB)
        v. Bytes total/sec= 121,246,125 (925 Mbit/sec)

c. Requests:
    i. GetSecurityToken: Average - 308ms, Median 295ms, 90% line 665ms
    ii. OpenSession: Average - 1008 ms, Median 1119ms, 90% line 1152ms
    iii. GetChunk: Average 236ms, Median 113ms, 90% line 627ms (this is for a medium quality stream 1.15Mbps)

d. Comments:
    i. The bottle-neck in this test was the network bandwidth between the streaming server and the video player running in the user's browser. The purpose of this test was to determine how large a community could be supported with a 1 GBit network connection. Note that due to smooth streaming, the video player automatically adjusts based on network and client availability to maximize the number of users that can watch an uninterrupted video albeit at a lower quality level. With 11% CPU usage, ramping up to HD would, understandably, require more network bandwidth.

3. Video Center browsing for 10,000 members
  a. Test data
    i. 100 simultaneous users browsing a list of 1000 videos using various filters (not including video viewing)
  b. System statistics (Server A with a 100MBit network connection)
    i. CPU: 76%
    ii. Network: 20%
    iii. Disk: Normal, Utilization 27 read/writes per second,
    iv. Memory: 78%
  c. **Page load times**
    i. Video Center main page: <1 second, max 2.5 seconds (90th percentile)
    ii. Pagination on Video Center page: < 1 second, Max 3.2 seconds (90th percentile)
    iii. Filters (e.g. from "Most Liked", "Most Viewed". "Most Recent"): 1-2 seconds
    iv. Individual Video Page: <3.3 seconds, max 4.5 seconds (90th percentile)
  d. Comments:
    i. The bottle-neck in this test was the WFE which can be addressed by adding more WFE's – a very robust scaling strategy in SharePoint.

4. Encoding performance for 50,000 members:
  a. Test data
    i. 100 simultaneous users encoding 50 MB videos
  b. System statistics (Server C with 100 MB network)
    i. CPU: 89%
    ii. Network: < 15%
    iii. Disk: Idle, Utilization 38 read/writes per second ,
    iv. Memory: Normal 41%
  c. Comments:
    i. Predictably, the CPU is the bottle-neck which is why we recommend running the encoding service on its own server.

5. Video upload performance for 50,000 users
  a. Test data
    i. 100 simultaneous users uploading 50 MB files
  b. System statistics (Server A with a 100 MBit network connection to the uploader's browser)
    i. CPU: 51%
    ii. Memory: 69%, 1917MB Available
    iii. Top Process: w3wp, Private Working Set: 574,812 KB
    iv. HDD IO/sec: 1091 (> 500), Avg. Disk Queue Length. Mean 3, Minimum 1.064, Maximum 9
  c. Comments

i. Since videos are uploaded in "chunks", this tends to minimize the CPU, memory and network drain.

Sizing Guidelines

Video Stream Hardware Configurations

The following configurations are for planning purposes only. Hardware resource requirements can vary dramatically across similar user population sizes. These configurations, for the most part, reflect scale-out options. While the requirement for both the encoding server and streaming server is proportional to community size, the requirement for separate encoding server is driven by the size of the uploaded video files, frequency of uploading and the encoding-turnaround requirement. Since the encoding process is CPU and memory intensive, we recommend that the encoding server runs on its own machine.

1. Low volume video usage (under 1000 users)
    a. Streaming Server, Encoding Server on SharePoint Server
    b. Streaming Server on SharePoint Server, separate Encoding Server
2. Medium volume video usage (1000 to 50,000 users)
    a. Streaming Server running on a load-balanced WFE
    b. Separate Streaming Server
    c. Separate Streaming Server and separate Encoding Server
3. High volume video usage (+50,000 users)
    a. Separate Streaming Server and separate Encoding Server (scaled-up from medium case)

Hardware requirements

If these servers are running on machines deployed for another purpose, these recommendations are in addition to the resource recommendations required for these components.

a. Encoding Server

- 1 GHz or faster processor
- 3 GB of RAM or more
- 2 GB or more of available hard-disk space

Please consult the Microsoft Expression Encoder hardware requirements document for more details http://www.microsoft.com/expression/products/EncoderPro_SysRequirements.aspx

b. Streaming Server

Smooth streaming is very similar to serving-up static files and as such consult the following Microsoft documentation for more sizing details: (http://msdn.microsoft.com/en-us/windows/hardware/gg463392 and http://msdn.microsoft.com/en-us/windows/hardware/gg463394)
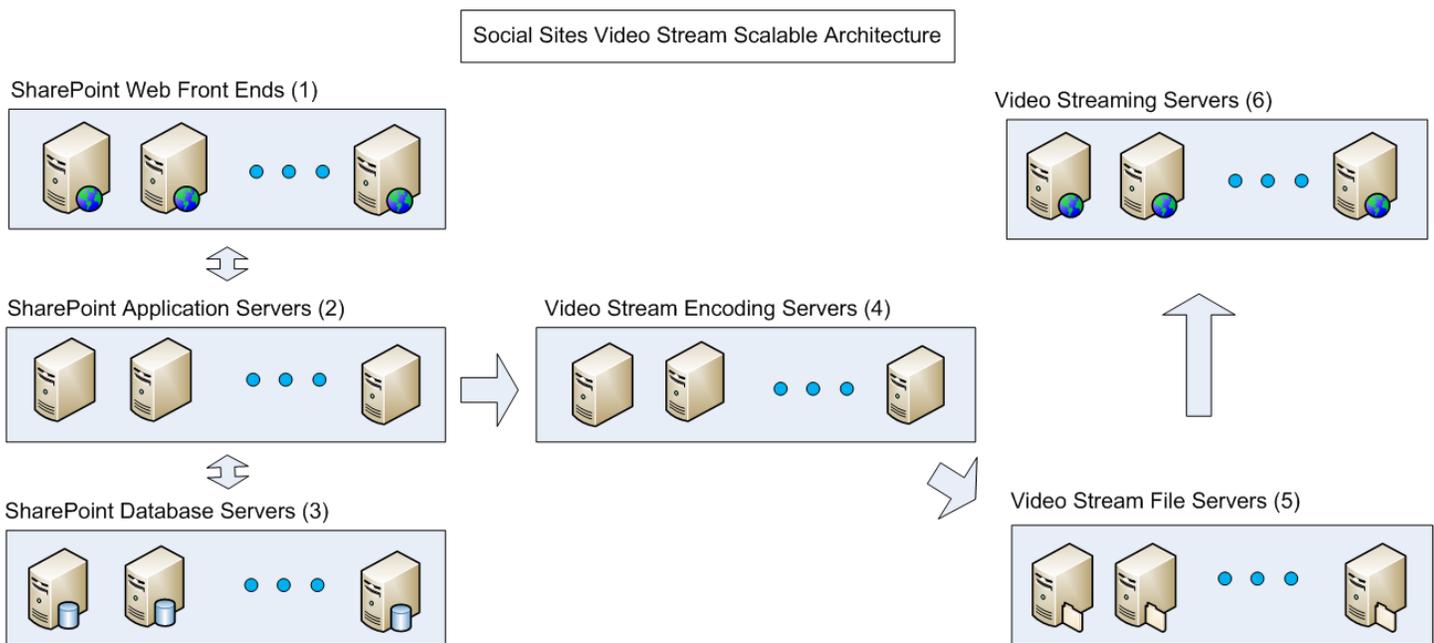
c. Network:

As seen in the performance report, network performance is the bottle-neck for video viewing performance. We would recommend the equivalent of 1 Gbit from the Streaming Server to the client's network in order to support concurrent viewing of high bit-rate videos. 100 Mbit may be fine

for the smaller installs depending on load.   Remember, the advantage of smooth streaming is that it will automatically throttle the bit-rate based on network availability and client performance.   As an additional safeguard, the IIS Media Extension for Bit Throttling can be used to further manage the amount of network bandwidth used for smooth streaming.

Further Scaling Options:

If further scale-out options need to be considered, the diagram below shows all of the components in the overall Social Sites Video Stream architecture that can considered (depending on where the bottlenecks are):

Social Sites Video Stream Scalable Architecture

SharePoint Web Front Ends (1)

Video Streaming Servers (6)

SharePoint Application Servers (2)

Video Stream Encoding Servers (4)

SharePoint Database Servers (3)

Video Stream File Servers (5)

(1), (2) and (3) indicate how SharePoint scales-out.   Social Sites scales with SharePoint. Browsing the list of videos, loading individual video pages (apart from viewing videos) and uploading videos (apart from encoding) impacts this part of the architecture. The performance impact of these activities on SharePoint is comparable to the impact of the Social Sites core functionality. Please refer to Social Sites capacity planning guidelines for more information.

(4) The Video Stream encoding service can be scaled by installing additional Encoding Servers. Since individual encoding servers check the encoding queue for the next video to be encoded, they do not require load-balancing. Please see the Video Stream install guide for details on installing more encoding servers.

(5) After files have been encoded they are stored on a file server. File servers can be scaled in a number of well-understood ways including SAN's.
(6) The Video Streaming service is supported through IIS with the Smooth Streaming media extensions.   This service can be scaled by adding additional servers and load-balancing them. Please consult Microsoft's IIS documentation to implement load-balancing.

Appendix O - Sitrion Social Video Stream 5.0 Integration with Kontiki

Overview

Many organizations who want to use Video Stream to truly make video "social" have already made substantial investments in video streaming infrastructure.   One of the popular enterprise-class video storage and streaming technologies that Newsgator customers are using is Kontiki.

When integrated with Kontiki, Video Stream continues to encode the uploaded video files but leverages the storage and streaming infrastructure of Kontiki. Kontiki's peer-based file sharing mechanism is ideal for geographically disparate environments as it minimizes load on the WAN by streaming from a copy local to a region or office.

This guide describes how to enable Kontiki as the storage and streaming mechanism for Video Stream. For the end-user, the Video Stream experience will be the same as using the Video Stream native option. For the administrator, the Kontiki integration capability deploys as a SharePoint feature.

Configuring Video Stream to support Kontiki

This section outlines the steps to enable and disable the Kontiki Integration feature.

Prerequisites

The Kontiki Integration feature requires Sitrion Social 5.0 and Sitrion Social Video Stream 5.0. These should be installed and configured before deploying the Kontiki Integration feature.   Since Kontiki handles the streaming, configuration steps or entries related to the streaming server in the Sitrion Social installer or the Video Stream Additional Components installer can be ignored.   IIS and the Smooth Streaming Extensions for IIS will not be required.

The Kontiki Integration uses the Microsoft Expression Encoder by default and so following the steps and filling entries related to streaming is critical. As of 3.0.2, you can use the free version of the Expression Encoder and it will encode to VC1.   If you have licenses to the Pro version, you can encode videos to H264 instead but the encoding service needs to be configured accordingly by changing the UseH264 parameter to "True":

```
<setting name="UseH264" serializeAs="String">
<value>False</value>
</setting>
```

Other encoders can be substituted programmatically. See the Newsgator Sitrion Social Video Stream 5.0 Third-party Video Solution Integration Guide for more details on how to integrate other encoders.

The Kontiki Integration feature requires the Kontiki client to be installed on any machine that will view videos. If the Kontiki client is not installed on the user's machines they will not be able view videos.

IMPORTANT:

Make sure you have a Kontiki user account with connector access allowing you to use the Kontiki publishing web service endpoint.

Step 1 – Configure SharePoint to trust the digicert root certificate used by the Kontiki publisher web service

Integration with Kontiki is done through a web service protected by SSL. The root certificate used by Kontiki must be trusted by your SharePoint installation. The root certificate that should be trusted by your SharePoint installation is the "DigiCert High Assurance EV Root CA". You can get the certificate from https://www.digicert.com/digicert-root-certificates.htm. Once you have a copy of the certificate on the machine you can proceed with telling SharePoint to trust this certificate.

1. Go to "Central Administration / Security / Manage Trust"
2. Click on "New"
3. Click on the Browse option of the "Root Authority Certificate" field
4. Select the file that contains the copy of the certificate

Step 2 - Installing the Kontiki solution file

The Kontiki integration is contained in the "NewsGator.VideoStream.KontikiIntegration.wsp" file. The Kontiki solution is not loaded by any of the NewsGator installers so this will need to be done manually. You can use STSADM to load this solution file into your SharePoint installation. Here is an example of the STSADM command that will load the solution file into SharePoint:

```
STSADM –o addsolution –filename .\NewsGator.VideoStream.KontikiIntegration.wsp
```

Once the solution has been loaded into your environment you can proceed to "Central Administration / System Settings / Manage farm features" and deploy it.

Step 3 - Activating the Kontiki Farm feature

Once deployed, a new Farm level feature will be available. This feature is called "**NewsGator VideoStream Integration With Kontiki (Farm)**". Activating this feature will turn on Kontiki integration. The VideoStream module will now use Kontiki to store and stream videos.

IMPORTANT:
After enabling the feature you should **restart IIS** and the **SharePoint Timer service** on all the servers in the farm.

Step 4 - Configuring Kontiki integration

Once the solution file is deployed and the farm level feature is activated a new Kontiki option will appear on the manage page for the VideoStream module. This option will take you to a Kontiki properties page where you can configure the connection with the Kontiki Publishing web service.

Fields on the properties page:

1. **Time Zone Code**: The time zone code of the server that hosts the "NewsGator VideoStream Management" timer job. That job uploads videos to Kontiki.
2. **Kontiki Publisher Web Service URL**: The URL to the Kontiki publisher web service. Will most likely be https://dms.kontiki.com/bizserv/webservices/Publisher/v6.
3. **Kontiki User Account**: Your user account **WITH CONNECTOR ACCESS** to the Kontiki Publisher web service.
4. **Kontiki Password**: Your password to get access to the Kontiki Publisher web service.
5. **Time in milliseconds the Kontiki Publisher Service waits for an upload to complete (-1 = waits for ever)**: The time in milliseconds the connection to the Publisher web service is kept alive while an upload is happening. If you want the connection to stay alive forever and never time out set it to -1.
6. **Kontiki Client Port Number**: The port number the Kontiki clients are configured to listen on in your environment.

Switching back to Video Stream native mode from Kontiki Integration mode

To switch back to Video Stream native mode, deactivate the "**NewsGator VideoStream Integration With Kontiki (Farm)**" in Central Administration/Manage Farm Features. After that, install the streaming server as described above.